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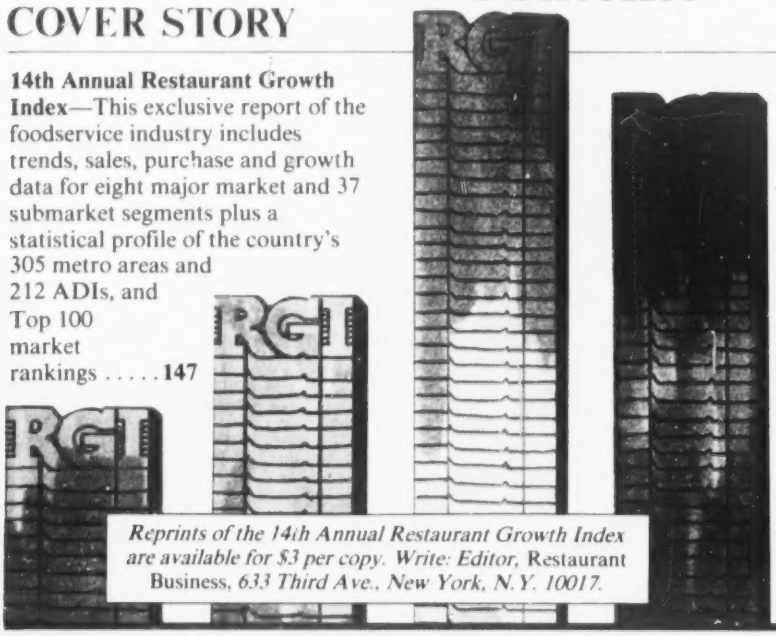

Reprints of the 14th Annual Restaurant Growth Index are available for $3 per copy. Write: Editor, Restaurant Business, *633 Third Ave., New York, N.Y. 10017.*

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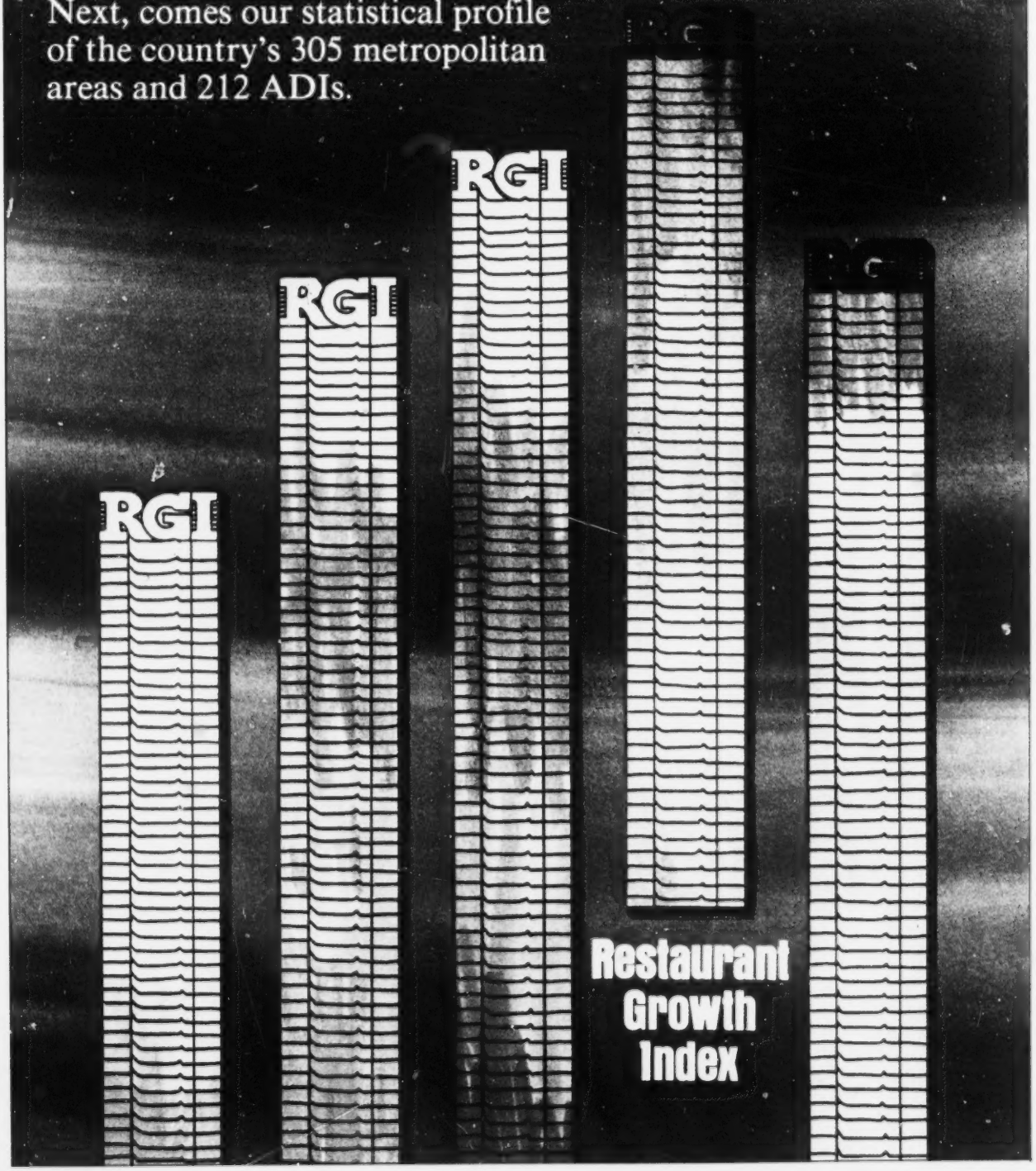
Cover by Joan Dworkin and Joanne Kaplan

Restaurant Business Cover Story

The 14th Annual Restaurant Growth Index is our updated analysis of the foodservice industry published each September. First comes our segment-by-segment study of the major trends in the industry as well as sales, purchase and real growth data for 8 major market and 37 sub-market segments. Next, comes our statistical profile of the country's 305 metropolitan areas and 212 ADIs.



In this year's edition of the *Restaurant Business* Growth Index, we provide hard data for 1979, best estimates for 1980, (the last full year), and a five year projection to 1985 for planning purposes.

New this year are summary comparisons of real growth (growth less inflation in menu prices or wholesale food prices) for 1979, 1980, and our 1985 projection.

Foodservice sales in 1980 increased 8.4 percent to a total of $114,011,000,000. This is a conservative figure as it does not include a commercial equivalent dollar volume for military feeding or school foodservice (we count only cash paid by students as actual sales); and it does not include vended can, bottle soft drinks or vended candy.

If we adjust our figures to reflect the higher values generated by the addition of military and school foodservice commercial equivalents and additional volume in vending categories not originally included, we would show industry sales of $131,030,000,000 an increase of $17,019,000,000 or 14.93 percent higher than our published figures.

In our view, these adjustments are not valid because they produce a result which is in turn, inflated (military and school feeding), not comparable (candy sales are not included in the Census of Retail Trade's merchandise line for meals and snacks or alcoholic beverages), or in the case of bottle and can vended soft drinks, through a restricted distribution network.

For 1985, we project foodservice sales of $187,140,000,000. This is a gain of $73,129,000,000 for the five-year period. This translates into a total growth of 64.14 percent or a compound annual growth rate of 10.42 percent.

What this means in real growth (which after all is what really counts) is sales in 1980 dollars will increase by $9,366,000,000 for the entire five-year period, 1980-1985. This is a compound annual rate of only 1.59 percent. Stripping away inflation, which makes nearly all projections impressively large, reveals that the real total growth is not a grand 64.14 percent for the five year period but only a very modest 8.21 percent.

It continues to be our judgement that the demand for foodservice among the consuming public is not satisfied. This year in the winter, the traffic counts were down but as spring approached counts began to move up. Inflation is still the primary barrier to growth as it simply saps the ability to buy and the will to buy. People have been economizing by reducing daily purchases over which they have some control.

If inflation is reduced substantially, the potential for a 4 percent real compound annual growth rate could be realized. The dollar difference in real terms between potential real growth and what we are forecasting is $15,335,000,000. The foodservice industry is projected to grow at 37.9 percent of its potential in real dollar terms. Another way to express this figure is that the industry could grow 2.6 times current projections in real terms. We estimate that menu price increases will grow at an 8.85 percent compound annual rate over the next 5 years. Wholesale food prices will increase at a somewhat slower 7.71 percent compound annual rate.

We use compound annual growth rates to express change in our projections because they are mathematically correct. To illustrate, if we multiply the 1980 industry total of $114,011,000,000 by the compound annual growth rate of 10.42 percent (1.1042) and then multiplied the result by 1.1042 and did this procedure three more times we would obtain the 1985 result of $187,140,000,000. If the same procedure was duplicated using 12.83 percent the average annual growth figure, the result would be a projected sales figure of

This summary was prepared by RBI Research and Malcolm Knapp, president of Malcolm M. Knapp, Inc., New York. The 1979 sales and purchases data used in this eight major market and 37 sub market growth report were prepared by Mr. Knapp under contract with the National Restaurant Association. Estimates for 1980, and projections to 1985 were prepared specifically for Restaurant Business *Magazine.*

Foodservice Industry Summary

	1979 Sales ($000,000)	1979 Purchases* ($000,000)	1979 vs 1978 % Growth	1980 Sales ($000,000)	1980 Purchases ($000,000)	1980 vs 1979 % Growth	1985 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Total Market	105,212	48,548	10.1	114,011	52,467	8.4	187,140	10.4	1.6
Commercial/ Contract	88,740	36,201	10.1	96,209	39,119	8.4	161,474	10.9	1.9
Institutional/Internal	15,917	10,588	11.2	17,217	11,449	8.2	24,776	7.6	−0.3
Military**	555	1,759	−11.1	585	1,899	5.5	890	8.8	1.0
Major Market Segments									
Eating/Drinking Places	68,793	25,600	9.9	74,674	27,648	8.5	126,120	11.0	2.0
Hotel/Motel Market	5,892	2,076	8.9	6,386	2,250	8.4	10,357	10.2	1.2
Transportation Market	1,757	787	17.0	1,911	849	8.8	3,208	10.9	1.9
Leisure Market	2,235	849	11.3	2,474	979	10.7	4,425	12.3	3.2
Retail Market	3,075	1,175	10.3	3,355	1,280	9.1	5,451	10.2	1.2
Business/Industrial Market	6,874	7,451	11.6	7,222	7,963	5.1	11,763	10.3	1.3
Student Market	5,756	4,594	10.4	6,251	4,967	8.6	8,359	6.0	−1.6
Health Care Market	9,012	4,435	11.2	9,800	4,824	8.7	14,741	8.5	0.8

** Purchases include all food, nonalcoholic, and alcoholic beverages (does not include equipment or supplies).*
*** Sales data based on post exchanges and clubs; purchase data based on post exchanges, clubs & troop feeding.*

$208,482,000,000 in 1985.

The most important component in the growth rate of eating places is the rate of change in personal income. For our projection period, personal income will grow in the 11.6 percent to 12.0 percent range. We have set the eating place growth rate near that level as improvements in tax rates will enable households to better preserve their income against inflation.

We will still have higher interest rates than traditional historical levels, inflation will still be high by historical standards and energy costs will stay high. The underground cash economy will continue at its current high level and much of this "extra" disposable income will flow to the restaurant industry.

Employment will be up about 1 percent a year with office employment 2 to 3 times that rate. The economy will continue the shift toward a service economy.

The institutional/internal segment which is primarily driven by popu ion changes in the institutic ill have an overall negative growth because of reductions in student populations and decreased funding for school lunch programs.

A look at our new real growth summary chart indicates that we are emerging from two consecutive years of negative real growth. In our judgement, 1980 was the bottom point of the recent foodservice industry sales decline in real terms. There was a decline of −0.5 percent in 1979, and a decline of −1.3 percent in 1980. In contrast, we look for a modest real gain of 0.6 percent in 1981. In addition, the five-year projection is for real growth of 1.6% compounded annually.

The leisure segment of the industry will post the greatest real growth through 1985. Americans' pursuit of recreational activities closer to home will provide the major impetus to this market's sales growth. There should be enough supply of gasoline to get people to nearby places even if prices continue to climb. While gasoline price increases will not stop local recreation, shortages of supply would cripple growth prospects of the leisure market as people would save gasoline to be sure to get to work.

We continue to get changes of a volatile nature in the marketplace. There are two fundamental causes of this volatility: inflation and interest rates. Inflation has been very high which distorts economic behavior. Interest rates have fluctuated widely but have stayed up at extraordinary levels for long periods of time. High interest rates make it difficult to plan for both consumers and business.

There is another factor which is a major contributor to our economic uncertainty. That factor is the heightened sense of economic pressure caused by the virtual blitz of media coverage of economic events. Economics is front page and TV lead item news. Media people vie with one another to be the first to describe in complete detail economic developments. This coverage of economic news tends to magnify positive as well as negative aspects of the situation thus contributing to the volatility of the marketplace.

The main point is that public attention is focused to an extraordinary degree on economic news. The person on the street is aware of the current price of gold, even though he is not a speculator. We live in the age of hype and our economic behavior reflects it.

Delivering value to consumers is still a critical element in achieving success in the foodservice industry. However, there is a new consumer focus—which is on imagination. People want, in fact they insist on the basics being done well, but now they want *basics plus imagination.*

Imagination might be in the decor or in the composition of the food on the plate or in the creation of a new food item or taste. This goes hand in hand with a renewed appreciation for excellence. People want quality and a professional job done for them. There is increased admiration for something well done, or well crafted. There is an increasing desire for basic hospitality not mechanics.

In short, the firms that do the best job on basics combined with imagination will be the winners in the next five years as the public is better able to judge excellence through experience.

Industry Real Growth Summary

	1979	1980	1980-1985
	Real Growth Rate	Real Growth Rate	Real Compound Annual Growth
Total Market	−0.5%	−1.3%	1.6%
Commercial/Contract	−0.7	−1.5	1.9
Inst/Internal	1.7	0.2	−0.3
Military	−22.3	−4.4	1.0
Major Market Segments			
Eating/Drinking Places	−1.3	−1.4	2.0
Hotel/Motel Market	−2.3	−1.5	1.2
Transportation Market	5.8	−1.1	1.9
Leisure Market	0.1	0.8	3.2
Retail Market	−0.9	−0.8	1.2
Business/Industrial Market	2.1	−3.9	1.3
Student Market	0.9	0.6	−1.6
Health Care Market	1.7	0.7	0.8

Wholesale price index will increase at 7.71% compound annual rate 1980 through 1985.
Menu price index will increase at 8.85% compound annual rate 1980 through 1985.

Cautious optimism characterizes much of the separate eating and drinking place segment, as the industry steps up its recovery. Although the market still shows some softness, the last quarter of 1980 indicated a more positive outlook as customer counts (a barometer of real growth) began to move upward—reversing a negative trend which began in the spring of 1979. This momentum in increasing customer counts has continued through summer of 1981.

In the past, the formula to boost sales and profits was often tied to increasing the number of units. However, tight money, a staggering prime rate of 20-plus percent and the decreasing availability of prime sites have constricted this traditional avenue of growth.

Today, greater efforts are being made to broaden the existing customer base, increase the frequency of regular customers and attract new customers to existing units. Methods to generate new business include: menu development, image enhancement, the establishment of catering and take-out departments, and more aggressive advertising/programs.

Menu expansion has emerged a key tactic of chain operators to capture a larger portion of a given market. The explosion of new menu items covers a broad spectrum: from Hardee's breakfast biscuits to Arthur Treacher's broiled fish; from finger foods like French-fried zucchini to dessert items like International Dairy Queen's new test item of hard ice cream.

Fast food opened the flood gates, and a spate of new products were positioned to recruit the "dinner hour" customer. Specialty sandwiches introduced by several major chains helped the fast food segment make sizeable in-roads into the dinner market.

Chicken has become a primary menu item for several "hamburger" chains. Much of poultry's popularity can be attributed to economics: it is cheaper to produce than either pork or beef.

As a result, by 1980, Chick-fil-A (originator of the chicken fillet sandwich almost 14 years ago) lost its monopoly. Chains including McDonald's, Burger King, KFC, Wendy's, Hardee's, A&W and Jack in the Box have rolled out their versions of the item.

In mid 1981, Burger King expanded its specialty sandwich line (chicken, roast beef, fish, ham and cheese) to include a veal parmigiana sandwich in four test markets.

Arby's efforts to shore up eroding customer counts and profits had twofold results: successful testing of four deli-type submarine sandwiches and introduction of a low-priced children's roast beef sandwich.

Foodmaker's Jack in the Box is concentrating its efforts on a better-educated, more nutrition-conscious adult. Accordingly, a "high nutrition" bean sprout salad was introduced this year.

Restaurants in the pizza segment are also seeking to increase their base. Pizza Inn reports 25 percent of systemwide sales can be attributed to its Sicilian Topper, thick crust pizza. Straw Hat and Pizza Hut have also introduced versions of deep dish pan pizza. Non-pizza items are also being tested by the chains.

According to Philip Barksdale, president of Perkins Cake & Steak Restaurants, the company continued its expansion plans in the face of economic uncertainties and as a result, the chain's performance was not as strong as originally forecast. To offset a softness in customer counts, Perkins recently introduced a series of five new $\frac{1}{3}$ lb. hamburgers with a variety of toppings.

Ground Round restaurants are capitalizing on the country/western influence with a menu featuring barbecued ribs and chicken. Victoria Station's menu now includes stuffed shrimp and "gourmet" game hens. Magic Pan has added snack items like cheese fritters with dip as appetizers.

As people become more discriminating in how they spend their food-away-from-home dollar, restaurants offering what the consumer perceives to be the best value will have the cutting edge in slicing up the market.

As a result, a growing emphasis is being placed on upgrading decor and menu items to match the consumer's increasingly demanding (and sophisticated) tastes.

For example in 1978, Skipper's Inc.'s market research indicated that, as the result of higher menu prices, its customers "desired more intimate and pleasant dining surroundings." In response, the company embarked on an extensive remodeling program which was completed this year.

A&W is updating its look by replacing orange roofs with brown, Mansard-style roofs and half of the 1,000 units are dropping the traditional orange and white colors in favor of brown and beige. Similarly, IHOP Corp. (with over 500 International House of Pancake restaurants) reports a 12 percent increase in traffic. The company attributes this to a revamping of its menu (reducing the number of items from 180 to 130) and replacing the blue and orange exteriors with tan and brown.

Ironically, as chains like A&W, Burger King, and McDonald's continue to upgrade decor and expand menu items, the market once again opens up for a chain positioned at the budget end of fast food. Currently, White Castle is alone in its bid for this market niche.

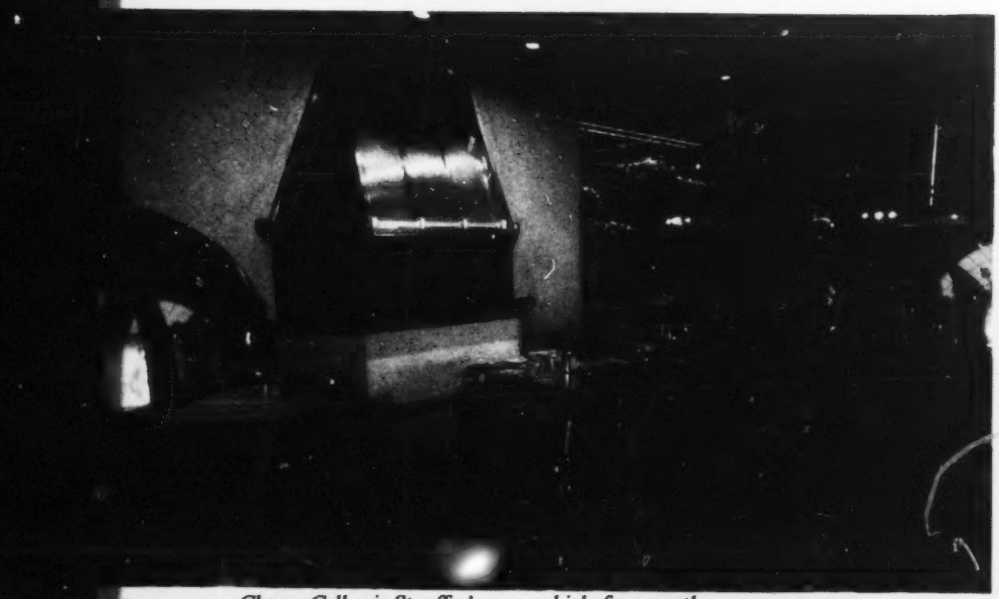
As fast food chains become more competitive in the dinner market, dinner house chains are packaging their restaurants in entertaining environments.

Among the leaders in the "fun" restaurant market segment are TGI Friday's Gilbert/Robinson's Houlihan's Old Place, Continental Restaurant Systems' Carlos Murphy's Irish Mexican Cafe, the Lettuce Entertain You Enterprises chain, Bobby McGee's Conglomeration, and General Mills' Darryl's.

In these themed restaurants, the common denominator is the eclectic decor and amusing, colorful menu which features "trendy" foods.

The Cheese Cellar (left) offers customers a mix and match menu of light foods and smaller portions.

Separate Eating & Drinking Places



Cheese Cellar is Stouffer's new vehicle for growth.

The new concept is changing the company's "tea room" image.

There are currently 12 Carlos Murphy's Irish Mexican Cafes operating in seven states. The menu capitalizes on the popularity of Mexican, barbecue and lighter fare.

Richard Mellman, president of Lettuce Entertain You Enterprises describes eight of the company's nine restaurants as being "funky yet functional. The eclectic decor matches the eclectic menu." (The ninth restaurant is the Pump Room in the Ambassador East Hotel.)

Stuart Anderson's Black Angus extends entertainment one step further with its lounges complete with dance floors in 74 of its 75 units.

An area offering great growth potential is take-out. A logical extension of traditional eat-in business, take-out offers the restaurateur a non-capital intensive way to add revenues.

Fast food chains already have a substantial stronghold on the market thanks to drive-through windows. Family restaurants, however, are exploring the take-out market. As part of its renovation program, Marc's Big Boy restaurants are dividing units into three sections: eat-in, drive-through and take-out.

The Crabhouse Inc. (based in Miami) broke ground last January for a take-out prototype unit featuring a double drive-through section.

At the 60-seat Day by Day restaurant in Philadelphia, owner Robin Rovner caters to a mixed clientele from the surrounding business and residential district. This innovative operator combines an

New York-based Pronto Ristorante—seven units strong—specializes in pasta dishes and features a display kitchen.

eat-in lunch business with a take-out only dinner business—with the latter accounting for 20 percent of total sales.

Independent operator Sal Celentano, of Rudy's, in Hackensack, N.J., increased his business by catering to private jets flying out of nearby Teterboro Airport. Any item from the restaurant's continental menu (as well as a specifically designed breakfast menu) can be prepared "to go." Celentano estimates the catering represents at least 10 percent of his business.

Dealing (couponing, sweepstakes, give-aways) reached an all time high in 1980 among restaurant chains—leading to speculation that in addition to its traditional function of bringing in new business, operators were using deals to maintain current customer traffic.

While dealing, especially couponing, can be an effective marketing tool, it must be used carefully. Over-couponing can create a "doubting Thomas" customer, suspicious of the real price. The impact of this double edged sword is evident in the budget steak house segment; dealing here has hit an unprecedented level—involving over 50 percent of all customer purchases in this market segment in 1980.

Stepped-up advertising and promotional campaigns were utilized last year to counter declining traffic. According to Tom Sherlock, director of marketing for Rusty Scupper restaurants, a 7 to 10 percent drop in head counts, while not severe, did

cause the company to implement a variety of promotions, including a nationwide six-week "Crabaganza" offering Alaskan King crab legs or a combination with steak, and a lobster tail special in the East.

Walter Staib, president of Davre's (ARA Services, Inc. restaurant division) recently initiated a San Francisco Food Festival promotion to create added interest in the company's Signature restaurant in Hartford and the Ninety-Fifth Restaurant located on top of the John Hancock building in Chicago.

According to John Quagliarta, vice president and general manager of Stouffer's Restaurant Division, its new Cheese Cellar restaurants will be the company's primary growth vehicle. (Although there are currently only four Cheese Cellars in operation, the company anticipates by 1985, 40 units will be opened.) As a result, special efforts are being made to market and position the units to attract a youthful market. The company is anxious to phase out the traditional "tea room style" of restaurant.

There were, of course, some companies and segments, whose performance was not so severly impacted by the economic downturn in 1980. In the fast food segment, ethnic foods such as Mexican, pizza and Chinese posted strong gains.

Mrs. Winner's Fried Chicken unit.

According to Jacques Ramackers, secretary/treasurer of the Pronto Ristorante National Corp., sales volume for the company's nine units reached $12 million last year: "Pasta is our staple item and even with inflation it is cost effective."

New concepts and variations on old themes are emerging to fill voids in certain market niches. For example, fast food oriental cooking has spread through chains like Oriental Express and Charlie Chan's.

Bakery items made on premise is growing in popularity as evidenced by the success of Vie de France which since 1972 has expanded to a force of 24 bakery/restaurants.

Other operators have followed the French chain's lead. During the past year, three different fast service croissant restaurants debuted in New York: The Croissant Show, Bonjour Croissants, and Le Croissant Shop.

To maintain growth, some companies have diversified. For example, Volunteer Capitol (Wendy's largest franchisee) established its own concept. Called Mrs. Winner's Fried Chicken, the 38-unit chain also features chicken and biscuits.

While there's nothing new about fast food chicken outlets, three companies introduced upscale chicken restaurants: Bojangles, Sisters, (Wendy's new concept) and Grandy's Country Cookin provide an expanded chicken and biscuit menu, and fast service in an upgraded decor. (See *Restaurant Business*, August 1, 1981).

As expansion possibilities into new domestic markets shrink, U.S. firms continue their international expansion efforts.

Japan is the target of the largest expansion effort while other countries supporting U.S. firms include: Canada (second after Japan), Great Britain, Australia, Belgium, Brazil, West Germany and Mexico.

Separate Eating and Drinking Place Sales

1979: $68,793,000,000 +9.9% Sales Growth			1980: $74,674,000,000 +8.5% Sales Growth					
1985: $126,120,000,000 — +11.0% Sales Growth Compound Annual; +2.0% Real Growth Compound Annual								
	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1980 Sales ($000,000)	1980 Purchases ($000,000)	1980 vs 1979 % Growth	1985 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Separate eating places	61,614	22,980	10.2	66,952	24,830	8.7	115,345	11.5	2.4
Full menu restaurants & lunchrooms	32,694	12,485	9.1	35,288	13,475	7.9	58,090	10.5	1.5
Social caterers	749	295	3.9	776	306	3.6	1,061	6.5	−2.2
Public cafeterias	2,045	776	6.9	2,164	814	5.8	3,290	8.7	−0.1
Limited menu restaurants	24,936	9,043	12.2	27,435	9,822	10.0	50,761	13.1	3.9
Ice cream, frozen custard stands	1,190	381	11.0	1,289	413	8.4	2,143	10.7	1.7
Bars & taverns	7,179	2,620	7.2	7,722	2,818	7.6	10,775	6.9	−1.8
Total	68,793	25,600	9.9	74,674	27,648	8.5	126,120	11.0	2.0

Current inflationary pressures continue to squeeze the lodging industry. As companies cut back on conventions and higher air fares curtail business and pleasure travel, occupancy rates have dropped approximately three percent from last year—from 69.9 percent in 1980 to an estimated 67.2 percent in 1981—and four percent from the 71 percent reported in 1979 (the highest level in 22 years).

Despite this occupancy drop, there has been an 11.4 percent increase in sales per occupied room and a 7.6 percent rise in total hotel sales.

In comparing the lodging industry's performance in 1980 with 1970, John D. Lesure, a partner at Laventhol & Horwath, notes: "According to our estimates, the number of available rooms was greater by 17 percent; the number of occupied rooms was higher by 27 percent and total revenue (excluding gaming) was up 181 percent in current dollars. In short, all signs pointed to a viable, growing industry. However, total revenue (excluding gaming) was six percent less in constant dollars."

For the greater part of 1980, the influx of international tourists (spending an estimated $16 million a day) helped offset softening in certain major metropolitan areas.

However, the increased strength of the dollar abroad has curtailed this growth. The U.S. is no longer the "deal" it was a year ago and for many hotels, the boom in international tourism seems to have dried up almost as fast as it began.

"Although summer is traditionally slow for us, the volume of international travelers carried us through the past few summers," says A. Gerald Parker, general manager of the Hotel St. Moritz (a Harley/Helmsley hotel). "However, a decline in the number of foreign guests was noticeable this July as was a drop in convention business causing some softness."

Parker estimates that his hotel's occupancy rate at the end of fiscal 1981 (year end June 30) was "in excess" of 80 percent.

One way the hotel plans to offset the decline is through offering a variety of two-day packages to boost sluggish weekend business among its social clientele. And to attract more corporate clients, the St. Moritz is placing added emphasis on its function rooms such as the Quadrille Ballroom and the rooftop Sky Garden Terrace (see picture). Parker notes that group catering contributes 15 percent to food and beverage revenues.

Pressures to make hotel food and beverage facilities separate profit centers have forced hotel restaurants and bars to compete with local operations. Although this is difficult in a city with such a wide variety of restaurants as New York, Parker notes that the hotel's sidewalk Cafe de La Paix, Rumpelmayer's and Harry's Bar operations attract 50 percent of their business from local residents or local business people.

In a desire to maintain that base, the hotel invested $1 million last April to renovate and update the sidewalk cafe.

Although food and beverage revenues are up at Sheraton Hotels and Inns Worldwide, vice president and food and beverage director Stephen Peeck attributes this to increased check averages rather than increased cover counts.

He notes that price resistance seems to be the strongest in the mid-price segment. As a result, Sheraton will use its "signature" restaurants (specialty restaurants designed to attract the upscale customer) as a way to build traffic.

Peeck points out that an aggressive local advertising campaign has positioned Apley's (Boston's signature restaurant) so successfully in the local market that "hotel guests have trouble getting in."

The company is also making a conscious effort to capitalize on local food trends. For example, at Landry's restaurant (located in the Sheraton Plaza La Reina in Los Angeles) a specialty sushi bar, which dominates the entranceway, operates from lunch through late-night dining.

Some areas seem recession proof. Texas is a major beneficiary of the southern migration of business and industry. This is further evidenced by the growth of cities such as Dallas, Houston and most recently Fort Worth. Completion of a new convention center and additions of new hotels have positioned Fort Worth more competitively with other Texas cities.

Opened last may, the Hyatt Regency Fort Worth combines the 1921-vintage facade of the Hotel Texas with a modern interior dominated by a lobby waterfall and pool.

To attract local residents, and

Le Restaurant Maurice (left) in the Hotel Parker Meridien draws its clientele from local New Yorkers as well as hotel guests.

Available for private parties, the rooftop Sky Garden at the St. Moritz overlooks Central Park, and upper Manhattan.

room guests, the hotel's Cafe Centennial (see picture) showcases a "help yourself" barbecue bar featuring items like barbecued chicken and ribs. According to David Kong, director of food and beverage, the rotisserie works as a selling tool.

The restaurant also incorporates food items indigenous to Texas (sweet potato pie, jalapeño pepper, barbecue sauce) on its menu.

The food and beverage team from Hilton International has expanded the regional food trend even further at its new Vista International Hotel. Here, The American Harvest restaurant demonstrates the food heritage of the U.S.

Items on the menu include Martha's Vineyard green corn pudding and Creole jambalaya and are served in five dining areas which seat only 20-24 people. To further accent the national heritage, a seasonal display of antiques (on loan from the Museum of American Folk Art) decorate each room.

The 825-room Vista International, located in New York City's World Trade Center complex, is the first major hotel to open in lower Manhattan since 1836. Indeed, this past year provided a boom of hotel openings in New York. From mid-1980 through the summer of 1981 new openings included: The Helmsley Palace; the Harley Hotel; the Grand Hyatt; and the Milford Plaza.

While American developers and hotel chains invested in these properties, international firms were also attracted to the New York market.

Hotel Parker Meridien, opened mid-March 1981, is the flagship of the North American division of Meridien Hotels, a wholly-owned subsidiary of Air France. With a solidly established reputation built in Europe, Meridien entered the U.S. market in Houston in 1978. A 330-room Boston property is scheduled to open this month.

Leaning heavily on the hotel's French background, Le Restaurant Maurice attracts a well-traveled clientele willing to pay an average check of $26 for lunch (food only) and $31.50 for dinner.

"Maurice is a restaurant, not a hotel restaurant," emphasizes Benoit Gateau-Cumin, food and beverage director for the hotel. "Our goal is to be one of the top five French restaurants in New York. With our background, we can accomplish this."

The construction boom of new hotels in New York is by no means typical—most construction bids had been placed and accepted before the interest rates ran out of control.

As John D. Lesure, a partner at Laventhol & Horwath points out: "The lodging industry plant (land, building, equipment, etc.) conservatively valued at $32 billion in 1970 could not be replaced today for three times that amount."

As a result, high costs have encouraged the renovation of older hotels. The Peabody, a Memphis landmark, is scheduled to open this month following the infusion of over $18 million for renovations. Built in 1925, the 452-room hotel is privately owned by the Belz family. The hotel features a Lobby Bar for cocktails and high tea, a 90-seat French gourmet restaurant, Chez Phillippe, and a 230-seat theme restaurant called Dux.

While renovations and restorations provide one avenue of growth for the lodging industry, casino gaming operations provide the key to revitalizing otherwise stagnant resort areas. According to a report in the *New York Times*, "Atlantic City's seven casinos took in more than $91.8 million in June, 1981."

With the scheduled Fall opening of the Tropicana in Atlantic City, Ramada Inns Inc. will firmly establish itself in the gaming business. (In 1979, the company entered the market with its purchase of the Las Vegas Tropicana Country Club.) To capture a larger share of the gambler's dollar, the hotel's five lounges and six restaurants offer a wide variety of concepts ranging from Atlantic City's first wine bar (Grapes/Grapes/Grapes) to an observation lounge (Top of the Trop).

Development and expansion of motor inns has been spurred as business people and vacationers examine cost-effective ways to travel.

To take advantage of this growing market base, Days Inns of America Inc. invested more than $15 million in capital improve-

Hotel/Motel Market: Foodservice Sales

1979: $5,892,000,000 +8.9% Sales Growth			1980: $6,386,000,000 +8.4% Sales Growth					
1985: $10,357,000,000 — +10.2% Sales Growth Compound Annual; +1.2% Real Growth Compound Annual								
	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1980 Sales ($000,000)	1980 Purchases ($000,000)	1980 vs 1979 % Growth	1985 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Hotels	3,285	1,149	8.9	3,564	1,246	8.5	***	***	***
Motor hotels	808	282	8.9	876	306	8.4	***	***	***
Motels	1,799	645	8.8	1,946	698	8.2	***	***	***
Total	5,892	2,076	8.9	6,386	2,250	8.4	10,357	10.2	1.2

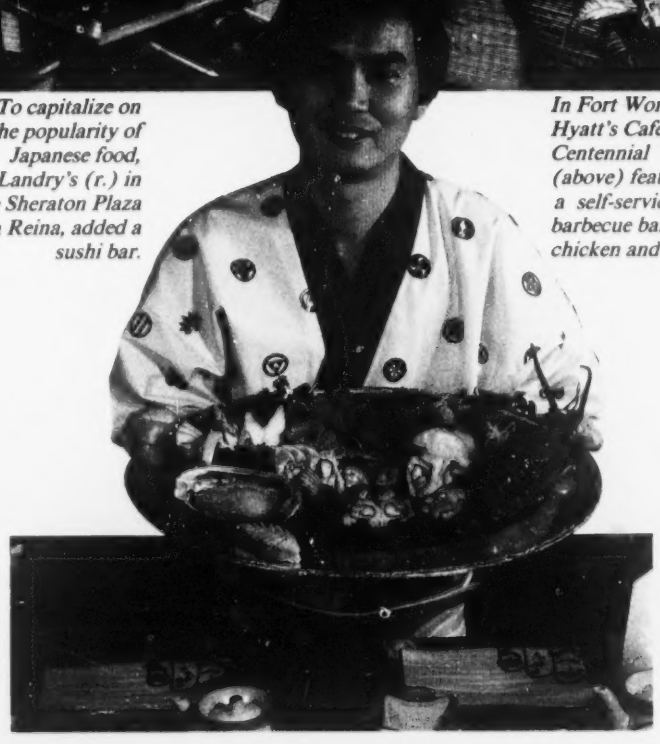
*** *There is not sufficient data to develop individual projections for these sub-market segments.*

ments, repair and maintenance. The units operate as a four-in-one stop for travelers providing lodging, gasoline, a restaurant and gift shop.

In addition to upgrading its family style Tasty World restaurant, the company recently introduced DayBreak, an operation designed to compete with fast food units. Open 24 hours, DayBreak features a varied menu of hamburgers, soups, salads, sandwiches and breakfast items.

To attract all segments of the traveling market, Quality Inns International, divided its operations into three groups: Quality Royale, a select group of hotels, inns, and resorts representing the upper two percent of the chain; Quality Inns, to attract the mid-priced commercial business or vacation traveler; and Comfort Inns to attract the budget conscious traveler or family.

To capitalize on the popularity of Japanese food, Landry's (r.) in the Sheraton Plaza La Reina, added a sushi bar.



In Fort Worth, Hyatt's Cafe Centennial (above) features a self-service barbecue bar with chicken and ribs.

The long-term outlook in the leisure market is optimistic. With the escalating cost of gasoline seemingly under control and in plentiful supply, the incidence of family driving has increased.

And, as travelers hit the road this spring and summer, there was noticeable boost in park attendance. The National Park Service in Denver records an attendance jump of 10 percent over 1980 levels; while at Grand Canyon National Park in Arizona attendance is up 58 percent.

The same holds true for theme parks. "We are cautiously optimistic," says John Andersen president of Marriott's theme park division. "If the economy and the weather hold out for the rest of the summer, we expect a seven percent increase in attendance with a comparable increase in revenues, profits and per capita spending."

The annual sales volume of the division is $100 million.

Disneyworld in Orlando, Fla. is busy completing the next generation of theme parks. EPCOT (Experimental Prototype Community of Tomorrow) Center is one of the most aggressive expansion projects undertaken by Disneyworld. When it opens in October 1982, EPCOT Center will be an $800 million facility covering 260 acres—twice the size of the current Magic Kingdom.

Attendance is also up at Louisiana Downs, a racetrack in Bossier City. According to food and beverage director David Yount, concession sales of $4.4 million in 1980 were up 33 percent from $3.3 million in 1979. He estimates that this year sales should top $5.2 million.

In addition to five dining rooms, there are 18 concessions. La Nacheries is one of the newest; it features nachos and cheese sauce and frozen margaritas. The Fortune Cookie provides bakery items like cookies, cake and pie from the on-premise bakery.

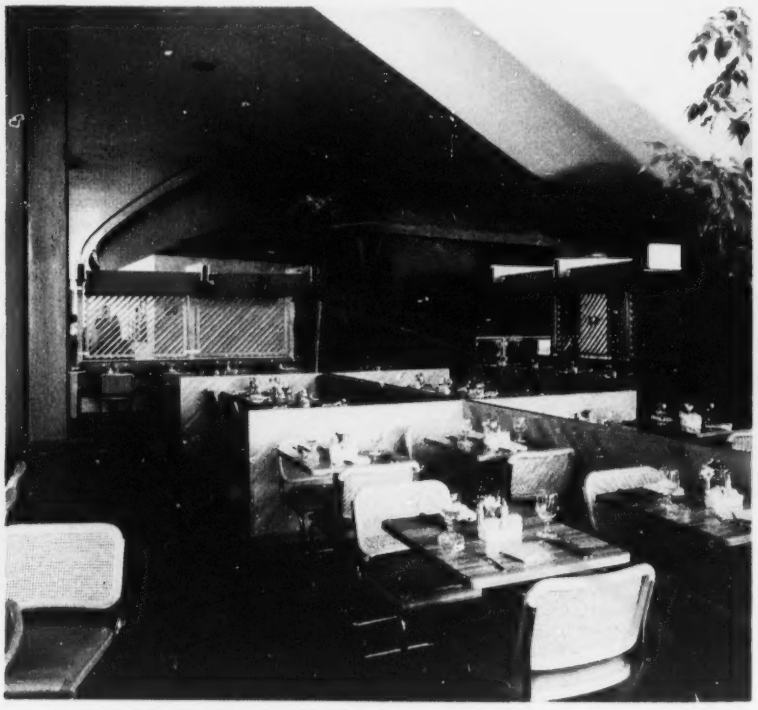
Since the track is open only 105 days, Yount has initiated a catering department which handles private parties during the off-season. To expand business even further, Yount is considering a freestanding beer garden located outside the stadium.

As the third busiest ski area in Colorado, Breckenridge holds promise for the Ogden Corp., which operates three restaurants there. Despite a snowless season in 1980, the company opened its newest restaurant—Peak 8. Food manager Robert Hensley is optimistic about the coming season: "The growing popularity of the sport and the area can only help us."

There were, of course, disruptions in the leisure market. It is hard to imagine that the two words "Play Ball!" could bring such rejoicing to foodservice management firms operating in the sports segment. But, with the two month (June 12—August 10) baseball strike finally settled, stadium concessionaires are struggling to make up for lost sales and profits.

While cities lost revenues in stadium rentals, parking fees, restaurants and hotels, concessionaires lost $3 per capita on baseball fans. Major league baseball attracts close to 45 million fans. The loss of one-third of the season due to the strike resulted in a loss of almost $40 million in sales to stadium food and beverage concessionaires.

In Manhattan, a strike of another



Experience operating the Adagio Buffet (left) and other Lincoln Center facilities helped Restaurant Associates Inc. win the contract for the Kennedy Center in Washington D.C. (right).

Located in Colorado's third busiest ski town, Ogden's The Peak 8 caters to a varied clientele with cafeteria-style service.

kind curtailed business for Restaurant Associates Inc. (RAI). Last fall, the New York City Opera went on strike and the result was a decided impact on business at the Allegro Cafe and Adagio Buffet, two facilities operated by RAI in Lincoln Center.

"To us, a darkened opera house meant 4,000 fewer potential customers. And opera goers are approximately 40 percent of our customer base," says Robert Arnold, director of operations for the center. He notes that a variety of promotions and schedule adjustments for the two facilities helped the company ride out the strike.

Arnold estimates the annual sales volume at Lincoln Center nears $2 million.

Luckily, there was no strike at Washington D.C.'s Kennedy Center, another RAI operation. Here a variety of special promotions will help boost sales to a projected $4 million for 1981.

Leisure Market: Foodservice Sales

1979: $2,235,000,000 +11.3% Sales Growth				1980: $2,474,000,000 +10.7% Sales Growth					
1985: $4,425,000,000 — +12.3% Sales Growth Compound Annual; +3.2% Real Growth Compound Annual									
	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1980 Sales ($000,000)	1980 Purchases ($000,000)	1980 vs 1979 % Growth	1985 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Places for special events/ seasonal recreation	1,508	558	11.7	1,680	622	11.4	***	***	***
Drive-in movie theaters	162	53	10.2	176	58	8.8	***	***	***
Bowling lanes	458	174	11.5	504	191	10.1	***	***	***
Sporting & recreational camps	107	64	7.4	114	68	7.1	***	***	***
Total	2,235	849	11.3	2,474	979	10.7	4,425	12.3	3.2

*** *There is not sufficient data to develop individual projections for these sub-market segments.*

Increasing productivity, controlling costs, and adopting new marketing methods for food and beverage facilities are the methods inflight caterers are using to combat the decrease in domestic airline traffic.

The drop is reflected in the segment's real growth rate. In 1979, the real growth rate for foodservice sales in the transportation market was 5.8 percent; in 1980 real sales declined 1.5 percent. During the next five years, foodservice sales in this market segment is expected to increase at a real compound annual rate of 1.9 percent.

Marriott Corporation, the largest supplier of catering services to airlines, operates over 70 flight kitchens serving 75 airlines. According to J. Robert Schultz, executive vice president of Contract Food Services, the division's profits were up 28 percent; sales rose 10 percent.

Schultz attributes much of the division's increased profitability to higher productivity levels. "Last year, we established a productivity group in our headquarters. Comprised of industrial engineers, employees and supervisors, the group studied productivity by working in various kitchens. Then they drew up guidelines to maximize efficiency," Schultz explains.

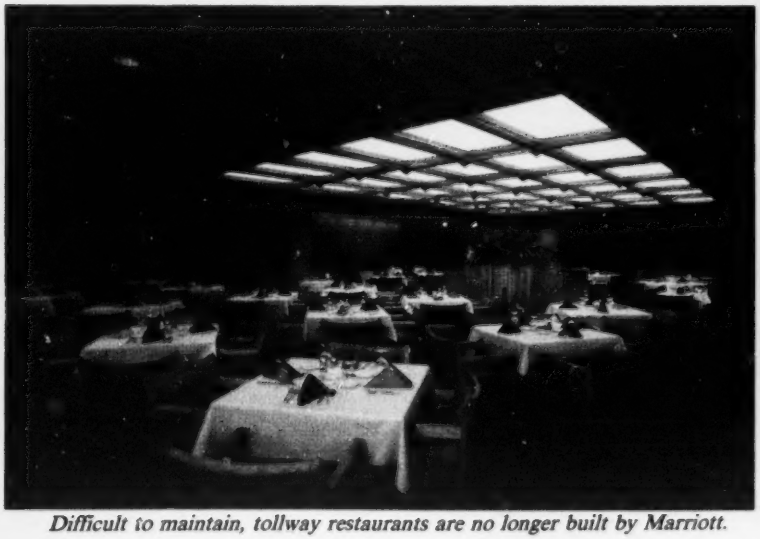
As a result of their findings, Marriott has invested in excess of $3 million to make kitchens more efficient. For example, in some cases additional conveyor belts or dishwashers were installed.

Delta Airlines recently opened one of the world's largest kitchens in the nation's second busiest airport—Hartsfield Atlanta International. A joint venture owned by Delta and operated by Dobbs House, the 122,000 sq. ft. kitchen is highly automated. For example, trolley carts running on a half-mile automated tracking system can transport equipment and meals through the kitchen.

The bulk of Dallas-based Sky Chefs operations is its airport terminal food and beverage facilities. In addition, the company services 46 carriers.

"Over 75 percent of our airport customers are impulse buyers and as the number of passengers decline so does the number of people that walk past our units," he notes. As a result, the company is trying to respond to "the nature of the customer." Sky Chefs is concentrating its efforts to make airport concessions more attractive and colorful.

O'Neill also points out that as airports lean towards making concessions "non exclusive" and begin incorporating specialty food shops, Sky Chefs must protect its interests. As a result, the company recently



Difficult to maintain, tollway restaurants are no longer built by Marriott.

Marriott reports sales are up 10 percent; profits, 28 percent.

concluded a franchise agreement with Häagen Dazs to establish ice cream kiosks in airports.

As airline fares increase, more consumers are turning to alternative methods of transportation. According to Continental Trailways, during the past two years, almost 27 million people have traveled nearly four billion passenger miles.

"Our customers are those bus passengers and they are not here to eat," says Dave Laughlin, president of Trailways Foodservice.

To service this transient customer, Trailways designed the Refreshment Center USA, a radical departure from its traditional full-line cafeteria. A compact snack center, the unit features a menu of hot/cold sandwiches, burgers, hot dogs and breakfast items. The unit needs only 12 feet of counter space, and only one employee to operate it.

Although the incidence of driving is on the upswing, business at Truckstops of America has dropped 25-28 percent. Although the company registered sales of $30 million for its 28 operations, the high cost of fuel coupled with a drop in tourism had a decided impact.

"Restaurants aren't necessarily the draw they used to be," notes Ed Johnson, director of marketing. "The driver is going to where the fuel is cheaper so we price our diesel fuel competitively." However, to capture the total dollar, the company is aggressively promoting its restaurants to the local market.

Transportation Market: Foodservice Sales

1979: $1,757,000,000 +17.0% Sales Growth				1980: $1,911,000,000 +8.8% Sales Growth					
1985: $3,208,000,000 — +10.9% Sales Growth Compound Annual; +1.9% Real Growth Compound Annual									
	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1980 Sales ($000,000)	1980 Purchases ($000,000)	1980 vs 1979 % Growth	1985 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Air & rail (in transit)	949	470	20.4	1,046	518	10.2	***	***	***
Terminal facilities	454	168	17.0	487	173	7.3	***	***	***
Highway (interstate)	250	92	5.9	263	95	5.1	***	***	***
Passenger & cargo liners	104	57	16.6	115	63	10.8	***	***	***
Total	1,757	787	17.0	1,911	849	8.8	3,208	10.9	1.9

*** *There is not sufficient data to develop individual projections for these sub-market segments.*

The retail segment of the food-away-from-home market is unique in many respects. It is composed of department stores, variety and general merchandise stores, drug stores and retail food stores including convenience facilities which sell meals, either to go or for on-premises consumption. In each of these operations, foodservice is not the principle source of revenue. For that reason, some chains in the retail store segment have traditionally looked askance at their foodservice facilities, considering them merely a customer service.

But recently, the foodservice business in this environment has taken on added importance. (For an extended look at department store foodservice, see *Restaurant Business*, September 1, 1981.) These changes have occurred for a number of reasons. The high costs of retail space no longer allow retail chains to continue to operate non-profit-producing departments. In addition, retail store executives have realized that restaurants are potential traffic builders in their own rights and, if properly managed, can be profitable and enhance the store's overall image.

Although still dormant in many retail chains, in-store foodservice for some innovative retailers is catching up with the rest of the restaurant industry. Department store foodservice managers report wider acceptance and support for restaurants within their retail organizations.

This new support takes many forms: primarily, a willingness on the part of store executives to provide the capital necessary for facility construction or renovation, menu development and the hiring of professional foodservice management. Many foodservice directors also report being offered better in-store locations, an important ingredient in their success.

While some department store organizations have chosen to abandon foodservice and others have decided to lease this department to outside

Bamberger's new restaurant and deli, Louie B's, is located in King of Prussia, Pennsylvania. Offering a variety of sandwiches, salads and full meals, the concept has met with tremendous success in other locations, according to Mulholland.

professionals, other chains have made the commitment to upgrade and expand foodservice on their own. Accounting and management techniques are changing to reflect this new environment.

Says Richard Ring, director of food operations for Cincinnati-based Federated Department Stores: "We are close to the completion of a program which will eventually bill all costs directly to restaurant departments."

The upshot of this, in a radical departure from the past, has been to force department store restaurants to become more competitive. In the past, restaurants were "carried" by the stores and were billed for only part, or none, of their operating expenses.

New design and updated menu concepts are appearing with great frequency throughout the restaurants in department stores. Some, including the Toronto-based Hudson Bay Company's "Crepes n' Greens," have even moved out of the stores completely to compete in mall food courts or as freestanding entities. These are all dramatic departures for a market segment which once existed only to provide a place for weary shoppers to rest their feet.

Foodservice is becoming an increasingly important product line in convenience stores. In fact, convenience store foodservice could pose a serious threat to the traditional restaurant business, particularly the fast food giants. With numerous locations (36,000), high visibility and economies of scale allowing for widespread regional and national television advertising, some of these convenience store chains are well positioned to take a larger slice of the growing food-away-from-home pie. An additional plus for convenience stores is the sale of gasoline at many locations. If and when gasoline availability or pricing problems again curtail customer movement, consumers will be more likely to seek out one-stop shopping opportunities. The convenience store market could come out the big winners in such an economic environment.

7-Eleven is the largest such chain. With more units nationwide than even McDonald's at the end of 1980, (7,000 for 7-Eleven vs. Big Mac's 5,910), the Dallas-based division of the Southland Corp.—which registered $900 million in foodservice sales in 1980—is in an excellent position for foodservice growth. The chain offers a limited menu to go: sandwiches, pizza, burritos, fountain soft drinks, coffee and breakfast items. Thirty sandwiches packaged under the 7-Eleven or Landshire name are prepackaged for fresh consumption or flash-frozen for reheating. The chains' signature item is a "Slurpee," a semi-frozen carbonated beverage.

In 1980, 7-Eleven embarked on a campaign to gain more recognition as a purveyor of fast food fare. Using the tag line, "7-Eleven has what you want, when you want it," the chain agressively promoted its entry into the breakfast market. 7-Eleven offers two specialties in the morning: "egg hamlette" and a sausage and egg with cheese sandwich.

Walgreen's, the Chicago-based chain of drug stores, posted $91.3 million in foodservice sales in fiscal 1980, seven percent of the company's total sales for the year. But, between 1979 and 1980, the chain closed 34 in-store restaurants. "We are in transition in terms of foodservice," says Thomas Mammoser, corporate news manager. "We are closing marginal restaurants and remodeling productive ones. But foodservice expansion is directed at our separately located restaurant concept, Wag's."

The chain, which operates primarily in Illinois and Florida, added 10 new Wag's in 1980. Other stores are being remodeled with a lighter, airier look to attract additional customers.

Retail Market: Foodservice Sales

1979: $3,075,000,000 +10.3% Sales Growth				1980: $3,355,000,000 +9.1% Sales Growth					
1985: $5,451,000,000 — +10.2% Sales Growth Compound Annual; +1.2% Real Growth Compound Annual									
	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1980 Sales ($000,000)	1980 Purchases ($000,000)	1980 vs 1979 % Growth	1985 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Department stores	986	395	7.6	1,053	422	6.8	1,674	9.7	0.8
Variety & general merchandise stores	470	183	9.3	507	197	7.9	779	9.0	0.1
Drug & proprietary stores	345	131	2.2	353	134	2.4	394	2.2	−6.1
*Other specialized retail stores (including food outlets)	1,274	466	15.5	1,442	527	13.2	2,604	12.5	3.4
Total	3,075	1,175	10.3	3,355	1,280	9.1	5,451	10.2	1.2

** Other specialized retail stores include: Food stores including grocery & convenience, gasoline service stations and misc. retailers (Liquor, cigar, etc.).*

The business and industry market is one of the largest segments of the foodservice industry. In 1980, it rang up $7.2 billion in sales and *Restaurant Business* projections show it growing at a 1.3 percent real compound annual rate through 1985.

Business and industrial operators have been innovative in recent years in the development of nutrition programs, in more aggressively promoting their foodservice facilities, and in emphasizing quality food, decor and service.

"We're doing well, but we're up against the same old problems," says Gerald Dreher, assistant manager of the John Hancock facilities in Boston. "Although we are subsidized, we face ever higher costs for food, labor and energy. It's not abating. The key is to provide the quality we want and that our employees demand."

Other business and industrial segment foodservice directors echo that thought. At Continental Illinois Bank in Chicago, three of six employee cafeterias were built within the last four years. "We're upgrading our facilities to provide a pleasant, non-institutional environment," says Erv Jensen, foodservice director for the bank. "A few years ago, the dining rooms were very austere. The attitude was to just get the food out there, but that's no longer the case."

Jensen, whose operation is also subsidized, observes that the improved dining atmosphere and the upgraded food are noticeably contributing to employee morale. Participation throughout the corporation is up, according to Jensen, who notes: "We're feeding many more people among the executive staff now, people we never used to see in here at all."

Richard Ysmael, corporate director of employee services for Motorola, agrees that renovation and upgrading to a quality image increases participation and improves employer/employee relations.

"At one of our new facilities in Phoenix," notes Ysmael, "We've been able to visibly demonstrate what a difference upgrading the dining facilities can make to employees. In a customer attitude survey following renovation, we discovered that a wide majority viewed the changes favorably and felt the new look in the dining rooms demonstrated Motorola's commitment to its employees."

"Our job is to deliver quality and value," says Fedele Bauccio, president of Saga's business and industry division. "We are after clients who view employee foodservice as a benefit. We are primarily located in corporate headquarters, banks and insurance companies. Our clients' entire thrust is toward quality."

Opened in 1976, this cafeteria at John Hancock's offices in Boston now handles 1,200 people for breakfast and 3,000 for lunch

Business and Industry: Foodservice Sales

1979: $6,874,000,000 +11.6% Sales Growth				1980: $7,963,000,000 +5.1% Sales Growth					
1985: $11,763,000,000 — +10.3% Sales Growth Compound Annual; +1.3% Real Growth Compound Annual									
	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1980 Sales ($000,000)	1980 Purchases ($000,000)	1980 vs 1979 % Growth	1985 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Contract feeding in plants (cafeterias primarily)	2,017	940	12.4	2,093	975	3.8	3,412	10.3	1.3
Contract feeding in business offices	541	252	13.5	591	275	9.2	1,012	11.4	2.3
Internal feeding-plants & business	1,302	637	11.6	1,362	666	4.6	2,040	8.4	0.4
Waterborne employees	233	140	12.6	254	152	8.8	350	6.6	1.0
Mobile on-street catering	434	152	12.6	462	162	6.4	799	11.6	2.5
Food vending machines (excluding packaged soft drinks & candy)	2,347	798	10.3	2,460	826	4.8	4,150	11.0	2.0
U.S. Defense personnel	***	1,537	***	***	1,660	***	***	***	***
Food furnished foodservice employees	***	2,995	***	***	3,247	***	***	***	***
Total	6,874	7,451	11.6	7,222	7,963	5.1	11,763	10.3	1.3

*** *There is not sufficient data to develop individual projections for these sub-market segments.*

Many of the major foodservice management firms and independents in this segment have begun to emphasize healthy, nutritious dining alternatives. Salad bars have become almost universal throughout this market, and many companies have developed comprehensive nutrition programs.

ARA's "Physfoods" program offers special menu items which are perceived by consumers as "healthy." The program is now in 75 percent of ARA business and industrial accounts.

Canteen provides information on menu item selection in its accounts. Employees are informed of a given item's caloric content, sodium and cholesterol quantity, etc. In addition, the company makes available information on dieting, running and other exercise regimens.

A similar program begun by Interstate United is called "Health nuts are committed to good nutrition." Menu boards and posters offer special items daily which are low in sodium, cholesterol, fat and carbohydrates. Brochures on these topics are available at tables. Interstate reports wide acceptance of the program, even in blue-collar installations. Some companies have designed their own exercise programs to dovetail with Interstate's "Health nuts" offerings.

Bauccio of Saga reports: "We're going back to basics in the area of nutrition. We are cooking almost 100 percent from scratch and producing our own soup stocks, rather than relying on prepared products."

Other foodservice directors, including Kay Stammers of Kodak in Rochester, New York and Erv Jensen of Continental Illinois Bank in Chicago, report more reliance on scratch cooking in their facilities.

And, at Kodak, vending is becoming increasingly important. Because the Rochester facility is sprawling and workers are scattered over large areas, vending has proven to be an attractive alternative. Refrigerated vending machines are filled three times a day with everything from hot dogs to full meals, all of which is prepared in Kodak's kitchens. The food purchased is heated in microwave ovens available near the machines.

Marketing and promotion has become an integral part of employee feeding. "We have to compete with the chains on the street in order to keep our participation percentages up," says Richard Ysmael of Motorola. To that end, Ysmael and his staff this year introduced a chicken sandwich. It was promoted with the tag line: "How do you build a great chicken sandwich? Naturally."

The product is a whole breast fillet which is breaded, fried and placed on a sesame seed bun with full garnish. "It's better than Wendy's sandwich," claims Ysmael. It was promoted with the give-away of a number of ten-speed bicycles in each installation. To obtain a chance a customer purchased the chicken sandwich and received a game form which required the proper answer to a question.

"The raffles generated terrific excitement and high visibility for the sandwich and for foodservice operations," says Ysmael. During the promotion, the chicken sandwich accounted for three percent of sales within Motorola's employee foodservice system.

Motorola is also promoting another meal occasion, the afternoon break. Using point of purchase materials from a yogurt manufacturer, the product was featured during the afternoons. "It has created business which was never there before," says Ysmael.

The Health Care Market

Burgeoning competition in the health care market is placing added stress on inflation-strained budgets. The health care market has experienced minimal real growth during the last two years—1.7 percent in 1979; 0.7 percent in 1980. The projection for real compound annual growth over the next five years is only 0.9 percent.

Several factors have contributed to increasing competition in the health care market.

The high cost of medical care and growing emphasis on preventative medicine and outpatient clinics has reduced the average patient stay to six days. In addition to fewer patients spending less time in hospitals, a boom in hospital construction a few years ago has resulted in a surplus of beds.

Since the health care operator also services the employee as well as the patient, operators must combat menu boredom among their customer base. In response to this problem, many are adapting on-street restaurant concepts to their operations.

Restaurant-style menus for patients on restricted diets have emerged as a marketable extra.

The Lutheran Hospital in Fort Wayne, Indiana, offers "A Special Meal" program of cooked-to-order foods with hostess service for an extra charge. Available for all three meals, the menu features a choice of appetizer, salad, entree, vegetable, wine (at dinner) and dessert.

According to J.C. Braden, administrative assistant in charge of foodservice, the special meal program has become a popular gift idea in lieu of flowers or candy. In addition, it allows visitors to enjoy a traditional meal with a patient.

ARA Services Inc. also provides a patient "roomservice" program. According to Mary Beth Crimmins, director of health care services for the company, the program was an expansion of ARA's "Stork Club" which provides a gourmet meal to a newborn's parents before leaving the hospital.

At Holy Name Hospital, in Teaneck, N.J., foodservice director Gerald J. Scelzi, designed a program catering to executives from the surrounding business community. "Since many of the nearby corporations require and pay for their employees' annual physicals, we implemented a program where the executives come in the night before. We provide a 'gourmet' meal of lamb chops or steak and the next day, the hospital conducts a total work up. The patient checks out of the hospital that afternoon."

As the inpatient market shrinks, hospitals are becoming more involved in the community. For example, ARA has been actively involved in a senior citizen feeding program both in the hospital and in the community with a "meals on wheels" program. "It is this type of business we have to cultivate for further growth," notes ARA's Crimmins.

To provide greater variety in its menu offerings and to spark community interest, Custom Management Corp. has adopted a "Guest Chef" program in major metropolitan areas. According to John Kravitch, vice president of the northern division, a well known local chef will be invited to the hospital to prepare the menu for both the patients and the staff.

"Foodservice is one of the benefits made available to our employees," notes Lutheran Hospital's Braden, "so it should be done with some creativity, and some flair."

Space constraints and high labor costs also pose considerable challenges to foodservice directors in the health care market. As a result

ARA's popular Stork Club offers new parents a gourmet meal.

A fruit-filled breakfast bar is one example of the many self-service concepts used at The Lutheran Hospital.

space-saving and non-labor intensive self-service bars have debuted in many operations.

At Lutheran Hospital, for example, a breakfast bar in the morning (featuring fresh fruits) becomes a "spectacular spud" baked potato bar featuring a variety of toppings at lunch. To compete with local fast food units, chicken fillet sandwiches are offered.

While self-service bars may help trim labor costs, many companies are re-examining their total operations. "Fighting inflation has been our biggest challenge this year," notes Robert Dohring, senior vice president of Service Systems. "We have placed additional emphasis on our cost containment program, purchasing specifications, recipes and productivity. We're going back to the basics: weigh it; count it; check it and then double check it."

Health Care Market: Foodservice Sales

1979: $9,012,000,000 +11.2% Sales Growth				1980: $9,800,000,000 +8.7% Sales Growth					
1985: $14,741,000,000 — +8.5% Sales Growth Compound Annual; +0.8% Real Growth Compound Annual									
	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1980 Sales ($000,000)	1980 Purchases ($000,000)	1980 vs 1979 % Growth	1985 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
Hospital—internal	6,055	2,740	11.4	6,570	2,973	8.5	9,654	8.0	0.3
Hospital/nursing home—contract	751	300	10.8	821	328	9.3	1,274	9.2	1.4
Other institutions—internal (for specialized care including nursing and old age homes, orphanages, etc.)	2,206	1,395	10.8	2,409	1,523	9.2	3,813	9.6	1.8
Total	9,012	4,435	11.2	9,800	4,824	8.7	14,741	8.5	0.8

The 1,000 seat Grace Watson cafeteria serves over 5,000 resident students daily from the Rochester Institute of Technology.

Foodservice operators in the student market are holding their breaths as they wait to see where the Reagan budget ax will fall. Currently, there is only speculation as to which districts will be hardest hit. It is evident, however, that the cuts will be down socio/economic lines with paying students most affected.

The cutbacks come at an already difficult time for operators. Real compound annual growth for this segment is projected to be a negative 1.6 percent over the next five years. (See chart below).

"The most difficult problem we face now, is projecting budgets," says Lineea Storm, vice president of schools services for ARA. "All we can do is guess, but it looks as if areas where 80 percent of the students are paying reduced prices or

Student Market: Foodservice Sales

1979: $5,756,000,000 +10.4% Sales Growth				1980: $6,251,000,000 +8.6% Sales Growth					
1985: $8,359,000,000 — +6.0% Sales Growth Compound Annual; −1.6% Real Growth Compound Annual									
	1979 Sales ($000,000)	1979 Purchases ($000,000)	1979 vs 1978 % Growth	1980 Sales ($000,000)	1980 Purchases ($000,000)	1980 vs 1979 % Growth	1985 Sales ($000,000)	% Compound Annual Growth	Real % Compound Annual Growth
School—internal (public, parochial, elementary & secondary)	2,136*	2,907**	10.2	2,296	3,125	7.5	2,682	3.2	−4.2
School—contract	577	283	9.5	624	306	8.1	926	8.2	0.5
Colleges, universities—internal	2,039	1,048	10.1	2,225	1,144	9.1	3,141	7.1	−0.5
Colleges & universities—contract	1,004	356	12.1	1,106	392	10.2	1,610	7.8	0.1
Total	5,756	4,594	10.4	6,251	4,967	8.6	8,359	6.0	−1.6

** Actual cash receipts from children reported by states to USDA (plus parochial and other private schools). Sales are lower than purchases because of subsidy programs.*

*** Not including $872 million worth of commodities and milk, a 12.4% increase from 1978.*

not paying at all, will probably not feel it as much as areas involving non needy' students."

Storm points out that community awareness needs to be stressed. "We probably will have to raise our prices and we want the parents to know why."

According to John Kravitch, vice president of the northern division for Custom Management: "Many schools are taking a look at changing their programs. While some may choose a 'brown bag' lunchroom, others will adopt a la carte programs."

The switch to a la carte programs may prove to be a life line for operators and schools alike. The advantage of such programs is that they allow a freedom of menu selection. Schools are freed from conforming to set menus and can spend their money buying what the students want to eat.

For the operators, a la carte programs provide an alternative avenue of sales. Both Custom Management and ARA are aggressively positioning these types of programs.

In addition, Custom is introducing its "Four for Fitness" program in elementary and secondary schools. The program is a system for matching nutritional values of foods with a variety of color codes.

Colleges and universities will not be as adversely affected by the decrease in student loans as their counterparts in elementary and secondary schools were by budget cutbacks. The challenge of profitably feeding a generation raised on fast food and demanding instant gratification remains one of the biggest problems in this segment.

Since three square meals a day is not necessarily compatible to the lifestyle of a college student, caterers in this segment are upgrading services to include delis and salad bars as tastes demand. This also explains the popularity of the "street of shops" concept which offers a variety of foods: tacos, hamburgers, pizza, frozen yogurt, and ice cream.

At Loyola University in New Orleans, one building houses all the foodservice on campus. This includes: a cafeteria, a fast food unit (Hardee's), a snack bar, a pub, and a soup, sandwich and salad bar within the pub. Here, students can pay with a credit card which is part of a central computer system.

A wide variety of foods helps fight menu boredom which continues to plague institutional foodservice operators. "Monotony breakers are still the key to the student market," says James Fox, director of business services for Rochester Institute of Technology which supports seven operations including a pub and a convenience food store. "We have expanded on 'theme' nights to include live music."

For example, on "Italian night" an accordian player will roam the dining facilities while on Valentine's Day strolling violinists will serenade diners.

Fox also points out the heavy emphasis the school places on nutrition. In addition to a newsletter on health and nutrition which is published twice a month, students from the hotel/restaurant school set up information booths outside eating areas.

Like their counterparts in the commercial sector, students are becoming more demanding in their choice of foodservice. At the University of Connecticut, a cocktail lounge and dinner house will open in November. It will be the university's ninth foodservice facility. "We intend this restaurant to be an alternative to the pub," notes Len Hodgsen, director of foodservice.

Featuring a menu of steak and prime rib, the 300-seat restaurant/lounge will feature live music three nights a week.

Budget cutbacks may cause elementary schools like this one in Rochester, N.Y. to switch to a la carte programs.

The traditional picture of military foodservice is of thousands of soldiers lined up to receive meat and mashed potatoes from a disheveled cook inevitably wearing a dirty apron with a cigarette dangling from his mouth. But in today's military, that picture of foodservice is far from the truth.

Although figures show a 4.4 percent negative real growth rate for 1980, military foodservice is expected to demonstrate a 1.0 percent real compound growth rate through 1985. President Reagan's proposal to increase military personnel by 200,000 people over the next two to three years, bringing the total in uniform to 2.3 million, will also have a dramatic impact on this market segment.

Military foodservice today is characterized by innovation in menu, decor and service. Taking a cue from the popular eateries outside their gates, some military installations are now offering entertainment, special events and variations on fast food.

At the Naval Education and Training Center in Newport, Rhode Island, one major innovation used to boost sales revenues is the booking of private parties, including wedding receptions and senior citizen gatherings. According to foodservice general manager Donald Bonville, who won an award this year from the Navy for his innovations, the old club, which used to be basically a stag room, has become a popular dining alternative for servicemen and their families.

The 27,000-sq. ft. operation includes five bars, a 180-seat dining room, a cocktail lounge seating 100 with a dance floor and a family room with pool tables, television and dart boards.

"No other restaurants in this area offer what we do," claims Bonville, "And our prices are better."

The effort being made to keep servicemen on base to seek entertainment and food is paying off: revenues last year increased to half a million dollars. Other promotions include "Big Band Night," featuring dining and dancing and a "Crab Feast," offering patrons all they can eat for $9.95.

At the Tinker Air Force Base in Oklahoma, fast foods are proving to be sales builders. Foodservice at Tinker consists of five cafeterias and five snack bars which grossed $4.5 million in 1980. Recently, the "Tinker Burger" was introduced. A modern building, the facility offers a wide range of fast foods, including the "Tinker Burger" itself, a 5.5 oz. burger with lettuce, tomato and sauce, which is sold for $1.60. The restaurant seats 40 and boasts a drive-through window. According to Clarence Price, general manager of the base restaurants at Tinker: "We're selling between 800 and 1,000 of those a day. The response has been tremendous and more people are staying on base to eat." Price has also used "two for one" promotions to attract business.

Robert G. Ashton, foodservice manager at the North Island Naval Air Station in San Diego, also reports success with a fast food concept, "The Line Shack." Offering burgers, fried chicken, deli sandwiches, breakfast and beverages, the 24-hour facility is taking in $35,000 monthly. "And its extremely profitable due to low labor costs," says Ashton. The restaurant has been advertised in base publications. Due to the success of this operation, the Navy will soon expand the concept to other bases in California and Texas.

Most military foodservice directors agree that proposed increases in base personnel and their families will have a positive effect on their sales.

The Commissioned Officers' Mess at the naval base in San Diego won the Navy's 1980 "Best Mess" award.

14th Annual Restaurant Growth Index

by Robert M. Katz

The Bureau of the Census has now begun disseminating some of the results of the April 1, 1980 Census. These data have been incorporated into the 1981 RGI report. Now the foodservice industry can determine exactly how the population has shifted in the past 10 years. We can also begin to learn a great deal about the characteristics of those who remain in certain parts of the country and those who have moved.

Perhaps, one of the most crucial items to be learned from this Census of Population and Households is the resident population count of the United States.

Prior to tabulating the results of the Census, the Bureau had estimated the population to be 221,670,000. After tabulating the official number became 226,505,000. That's a difference of 2.2 percent or 4,835,000, almost five million more people than expected. The additional people, it is assumed for now, are part of the previous undercount and the undocumented (illegal aliens) population. That is, those people who resided in the United States, but for official purposes were never able to be found until now. Those five million people are included in the 1980 Census. (Of course, there is still an undercount. During the next few years the Census Bureau will publish its estimate of those who couldn't be found.)

Table I is a summary of various Census statistics. The key data presented include: Population (4/1/80, 4/1/70); Households (4/1/80); Number of Persons per Household (4/1/80); Black Population (4/1/80); and Spanish Population (4/1/80). The data are for the total United States, as well as by major Census region and by state. *continued on page 178*

Mr. Katz is vice president of Market Statistics, a division of Bill Communications, Inc. *All data are copyrighted by* Restaurant Business *Magazine and* Sales and Marketing Management *Magazine and further reproduction is forbidden.*

Map 1. Population Growth by State and Region, 1970–1980

Key: Red equals top 17 states in rate of population growth
Blue equals middle 17 states in rate of growth
Yellow equals bottom 17 states in rate of growth

The key shift for the foodservice industries is that the average number of persons per household has shrunk dramatically. Not only are typical husband-wife families smaller in size, but the number of one person and two person households has also grown. This has had profound influence on the eating styles of Americans. To see how dramatic the shift has been, one must realize that the average household size has decreased from 3.205 (4/1/70) to 2.747 (4/1/80) in the past 10 years. That is a reduction of 14 percent. If the average size of the household had remained the same (as in 1970), we would have 70,672,387 households in 1980 rather than the 80,376,605 that were found. This is a difference of nearly 10 million.

On a state-by state basis, one can see some variations. Utah has 3.20 persons per household; Hawaii has 3.15, while District of Columbia has 2.40 and Florida 2.55. A great majority of the states fall in the 2.65 to 3.85 category—36 out of 51 states. That indicates similar household formation patterns in most of the United States. But the differences are attributable to changes in the general way of life. Utah has many family oriented citizens, while Florida has a large number of retired one- and two-person households.

Map I is a visual presentation of the tremendous migration that has taken place in the 1970s. The 50 states plus the District of Columbia are ranked by the population growth (1970-1980) and divided into three groups (red equals top 17 states in growth; blue equals middle 17 in growth; yellow equals bottom 17 in growth). Migratory shifts are of paramount importance to all marketers, especially in the foodservice industry.

Almost the entire Western part of the United States grew considerably above average. California and Montana are the two exceptions—as they experienced only average growth. Eleven of the top 17 fastest growing states are quite small and even a 25 percent increase in population does not add up to very many people. However, the implications of this phenomenon will continue throughout the 1980s. The concept of living in a more pleasant climate, with low population density and with a wide open countryside is a popular one. More and more people are willing to relocate to find a more casual lifestyle.

In the Northeast, only the relatively small state of New Hampshire grew above average. Most of the other states in this region sustained below average growth, the losers include the largest states in the area—New York, New Jersey and Pennsylvania.

The North Central region did not have a single state with above average growth. Throughout the 1970s, especially during the second half of the decade, this part of the country experienced severe economic problems, which were primary factors for the lack of growth.

The basic industries in these states include automotive, steel and rubber products, all of which suffered severe problems as a result of inflation and a general downturn in the economy. The problems in these basic industries have had a depressing effect upon the many contractors and sub-contractors that are unique to these industries, all of which have contributed to the outmigration of many unemployed and dissatisfied citizens from these states. The end result has been redistribution of blue collar workers, with a marked shift away from the Midwest to the West and South.

The Southern region, on a state-by-state basis, has enjoyed either average growth or above average growth. Not one state in this region was among the bottom 17 in growth.

The top two states in terms of the fastest growth were Texas and Florida. Between these two, in 10 years almost six million more people (3,029,728 in Texas and 2,948,574 in Florida) were identified by the Census. Of the total population increase in the United States, over 25 percent was concentrated in Florida and Texas.

The growth patterns in the 1970s have clearly shifted the population center southerly and westerly. In general, the movement is toward areas that offer better climatic conditions, newer facilities, less crowded neighborhoods and greater job opportunities. Some people move when there is difficulty finding employment locally. Others simply pack their belongings and go and then look for a job. But what many of those who move have in common is the direction of their move.

People who move to a new part of the country can be expected to spend more than the average consumer. They buy homes, furniture, and other goods; and are developing new expenditure habits, both as households, and as individuals.

Another fact well documented in the 1980 Census is the continued growth of two subgroups of the population: Black population and Spanish population. In 1970, Blacks accounted for 11.1 percent and people of Spanish origin 4.5 percent of the U.S. population. Combined they represented 15.6 percent of the total. Blacks now represent 11.7 percent of the population and Spanish 6.4 percent or 18.1 percent in total. However, in many markets (and even on a state basis) they form a larger percent of the total population. The Black and Spanish population in many parts of the country are the keys to having a successful marketing program.

Map II highlights the concentration of Blacks by state. The states and the District of Columbia are ranked by their percent of Black population.

As *Map II* illustrates, Blacks constitute a very large part of the population in the Southern region. Twelve of the states with the greatest concentration of Blacks are in the Southern region. Other Black population centers are located in the Northeast (New York, New Jersey, Delaware) and North Central (Illinois, Michigan) regions.

As shown in *Map III*, the Spanish population according to the results of the 1980 Census is also highly

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Table 1 1980 Census Demographic Highlights

REGION State	4/1/80* Population (Thousands)	4/1/70* Population (Thousands)	% Change 1970-1980	4/1/80* Households (Thousands)	4/1/80** Persons Per Household	4/1/80 Black* Population (Thousands)	% of Total	4/1/80 Spanish* Population (Thousands)	% of Total
Connecticut	3,108	3,032	2.5	1,094	2.76	217	7.0	124	4.0
Maine	1,125	994	13.1	395	2.75	3	.3	5	.4
Massachusetts	5,737	5,689	0.8	2,033	2.72	221	3.9	141	2.5
New Hampshire	920	738	24.8	323	2.75	4	.4	6	.6
Rhode Island	947	950	−0.3	339	2.70	28	2.9	20	2.1
Vermont	511	445	15.0	178	2.75	1	.2	3	.6
NEW ENGLAND	**12,348**	**11,847**	**4.2**	**4,362**	**2.74**	**475**	**3.8**	**299**	**2.4**
New Jersey	7,364	7,171	2.7	2,548	2.84	925	12.6	492	6.7
New York	17,557	18,241	−3.7	6,340	2.70	2,402	13.7	1,659	9.5
Pennsylvania	11,867	11,801	0.6	4,221	2.74	1,048	8.8	154	1.3
MIDDLE ATLANTIC	**36,788**	**37,213**	**−1.1**	**13,109**	**2.74**	**4,374**	**11.9**	**2,305**	**4.7**
Illinois	11,418	11,110	2.8	4,043	2.76	1,675	14.7	636	5.6
Indiana	5,490	5,195	5.7	1,927	2.77	415	7.6	87	1.6
Michigan	9,258	8,882	4.2	3,195	2.84	1,199	12.9	162	1.8
Ohio	10,797	10,657	1.3	3,834	2.76	1,077	10.0	120	1.1
Wisconsin	4,705	4,418	6.5	1,652	2.77	183	3.9	63	1.3
EAST NORTH CENTRAL	**41,670**	**40,263**	**3.5**	**14,651**	**2.78**	**4,548**	**10.9**	**1,068**	**2.6**
Iowa	2,913	2,825	3.1	1,053	2.68	42	1.4	26	.9
Kansas	2,363	2,249	5.1	892	2.62	126	5.3	63	2.7
Minnesota	4,077	3,806	7.1	1,446	2.74	53	1.3	32	.8
Missouri	4,917	4,678	5.1	1,794	2.67	514	10.5	52	1.1
Nebraska	1,570	1,485	5.7	571	2.66	48	3.1	28	1.8
North Dakota	653	618	5.7	228	2.75	3	.4	4	.6
South Dakota	690	665	3.8	242	2.74	2	.3	4	.6
WEST NORTH CENTRAL	**17,184**	**16,326**	**5.2**	**6,206**	**2.70**	**789**	**4.6**	**209**	**1.2**
Delaware	595	548	8.6	207	2.79	96	16.1	10	1.6
District of Columbia	638	757	−15.7	253	2.40	448	70.3	18	2.8
Florida	9,740	6,791	43.4	3,741	2.55	1,342	13.8	858	8.8
Georgia	5,464	4,588	19.1	1,872	2.84	1,465	26.8	61	1.1
Maryland	4,216	3,924	7.5	1,461	2.82	958	22.7	65	1.5
North Carolina	5,874	5,084	15.5	2,041	2.78	1,316	22.4	57	1.0
South Carolina	3,119	2,591	20.4	1,030	2.93	948	30.4	33	1.1
Virginia	5,346	4,651	14.9	1,863	2.78	1,008	18.9	80	1.5
West Virginia	1,949	1,744	11.8	686	2.79	65	3.3	13	.7
SOUTH ATLANTIC	**36,943**	**30,679**	**20.4**	**13,154**	**2.73**	**7,648**	**20.7**	**1,194**	**3.2**
Alabama	3,890	3,444	12.9	1,341	2.84	996	25.6	33	.9
Kentucky	3,661	3,221	13.7	1,264	2.82	259	7.1	27	.7
Mississippi	2,520	2,217	13.7	827	2.97	887	35.2	25	1.0
Tennessee	4,591	3,926	16.9	1,618	2.77	726	15.8	34	.7
EAST SOUTH CENTRAL	**14,663**	**12,808**	**14.5**	**5,050**	**2.83**	**2,868**	**19.6**	**119**	**.8**
Arkansas	2,286	1,923	18.8	816	2.74	373	16.3	18	.8
Louisiana	4,204	3,645	15.4	1,411	2.91	1,237	29.4	99	2.4
Oklahoma	3,025	2,559	18.2	1,119	2.62	205	6.8	57	1.9
Texas	14,228	11,199	27.0	4,929	2.82	1,710	12.0	2,986	21.0
WEST SOUTH CENTRAL	**23,743**	**19,326**	**22.9**	**8,274**	**2.80**	**3,525**	**14.8**	**3,160**	**13.3**
Arizona	2,718	1,775	53.1	957	2.79	75	2.8	441	16.2
Colorado	2,889	2,210	30.7	1,061	2.65	102	3.5	339	11.7
Idaho	944	713	32.4	324	2.85	3	.3	37	3.9
Montana	787	694	13.3	284	2.70	2	.2	10	1.3
Nevada	799	489	63.5	304	2.59	51	6.4	54	6.7
New Mexico	1,300	1,017	27.8	441	2.90	24	1.8	476	36.6
Utah	1,461	1,059	37.9	449	3.20	9	.6	60	4.1
Wyoming	471	332	41.6	166	2.78	3	.7	24	5.2
MOUNTAIN	**11,368**	**8,290**	**37.1**	**3,985**	**2.80**	**269**	**2.4**	**1,441**	**12.7**
Alaska	400	303	32.4	131	2.93	14	3.4	9	2.4
California	23,669	19,971	18.5	8,630	2.68	1,819	7.7	4,544	19.2
Hawaii	965	770	25.3	294	3.15	17	1.8	71	7.4
Oregon	2,633	2,092	25.9	991	2.60	37	1.4	66	2.5
Washington	4,130	3,413	21.0	1,540	2.61	106	2.6	120	2.9
PACIFIC	**31,797**	**26,548**	**19.8**	**11,586**	**2.68**	**1,993**	**6.3**	**4,811**	**15.1**
United States Total	**226,505**	**203,301**	**11.4**	**80,377**	**2.75**	**26,488**	**11.7**	**14,605**	**6.4**

** Data have been rounded and will not add exactly to U.S. total.*
*** Excludes population in group quarters.*

concentrated in certain regions. (The definition of Spanish varies from one part of the United States to another. It includes Mexican, Puerto Rican and Cubans primarily.) The Western region has the highest density of Spanish, followed closely by Texas, Florida and the New York area (including New Jersey and Connecticut).

California alone has over 31 percent of the total Spanish population of the United States; Texas has over 20 percent and New York has another 11 percent. In these areas, the numbers are large enough to represent a substantial marketing opportunity.

A trend that has recently been observed is the movement of economically mobile Blacks from the inner cities to the suburbs, following the pattern of whites who have been leaving the cities for the past 10 years in a huge migration to the suburbs, and even to more rural areas. Although this phenomenon has been most noticeable in the Northeastern states and in the industrial states of the Midwest, it gives every appearance of becoming an established pattern for the rest of the country.

The trend does not yet seem to have involved the Spanish to any large extent, primarily because their economic status inhibits mobility. But in time and given the necessary economic support and job opportunities, we can expect a gradual movement of Spanish people from the cities to the surrounding suburbs.

Since the families of Blacks and Spanish on an average, are larger than those of other population groups, we can easily accept the forecast that they will soon constitute almost 20 percent of our national population; a percentage that is both a challenge and an opportunity for the foodservice community.

Armed with accurate marketing information, the foodservice industry will be prepared to maximize the opportunities in the 1980s. These kinds of data are valuable for the local restaurant owner as well as an industry giant. They help people plan appropriate marketing strategies, such as where to enlarge facilities, open new ones, or even to close. Other considerations might relate to the use of Black and Spanish media to help to publicize regional specialties.

Definitions

Population:

Updated from the 1980 U.S. Census of Population and Housing, it is an estimate of the number of people living in an area at the end of the year. It includes people living in colleges and hospitals, and armed forces permanently assigned to the area, but excludes tourists and transients. Large changes in group-quarters populations are not projected in these forecasts.

Demographic statistics have been estimated employing a population component procedure. That is, inde-

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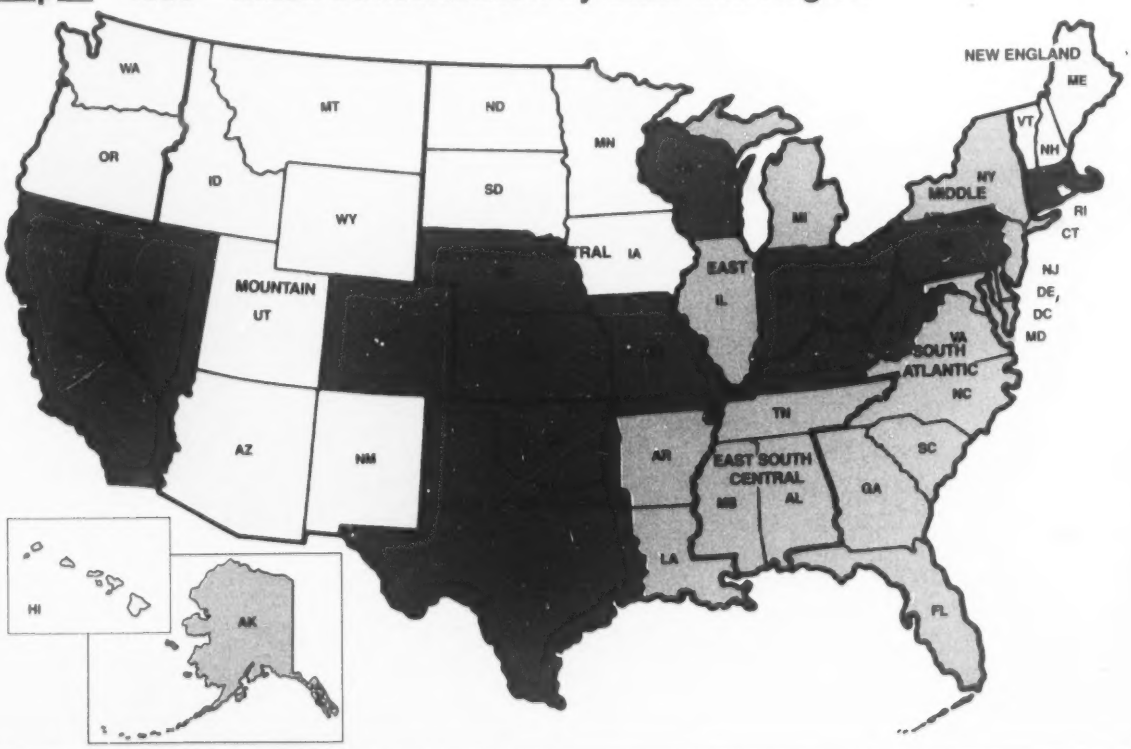
Map 2. 1980—Black Concentration by State and Region



Key: Red equals top 17 states in percent of Black population
Blue equals middle 17 states in percent Black
Yellow equals bottom 17 states in percent Black

pendent county estimates of births, mortality, and migration are generated. These population components are aggregated and either added or subtracted from the appropriate benchmark.

Fertility rates, for example, have been projected at their current rate of change. We assume that the pattern of births will continue its slow but steady rate. Similarly, we have assumed that no major medical advancement will be found over the next few years and that the mortality rates that are in effect today will continue unmodified.

Percent of U.S. Pop.:

A market's share of the total U.S. population.

Household:

A household consists of all the people occupying a single housing unit under 1980 census rules—such as a house, an apartment, a group of rooms, or a single room. The members of a household need not be related, and a single person living alone in a housing unit is also counted as a household.

All persons who are not members of households are regarded as living in group quarters: institutions, college dormitories, military barracks, etc. Caution: Although a county's population total will include all the people in the area, the household total will not do so because it excludes those living in group quarters.

Average Household Size:

Total population divided by the number of households. Depending upon whether it is above or below the U.S. average, it is used as a rough indicator of the relative importance of family-type units or single-person units in a local area. However, the figure can be artificially high in those relatively few counties where there is a disproportionate share of college, military, other other types of institutional population. The people living in such group quarters are part of the population total, but their dwellings are not part of the household total.

Eating and Drinking Places:

Includes establishments selling prepared foods and drinks for consumption on or near the premises or for takeout, as well as lunch counters and refreshment stands selling prepared foods and drinks for immediate consumption. Also included are caterers and in-plant food contractors, as well as leased eating and/or drinking concessions in theaters, hotels, amusement parks, etc. Restaurants and lunch counters operated by department stores are classified in General Merchandise Group; those operated by hotels are classified in the Hotels Group.

Eating Places:

Includes retail sales of restaurants and lunch rooms, social caterers, cafeterias, fast food sales, contract feeding and ice cream and frozen custard stands. Excludes drinking place sales.

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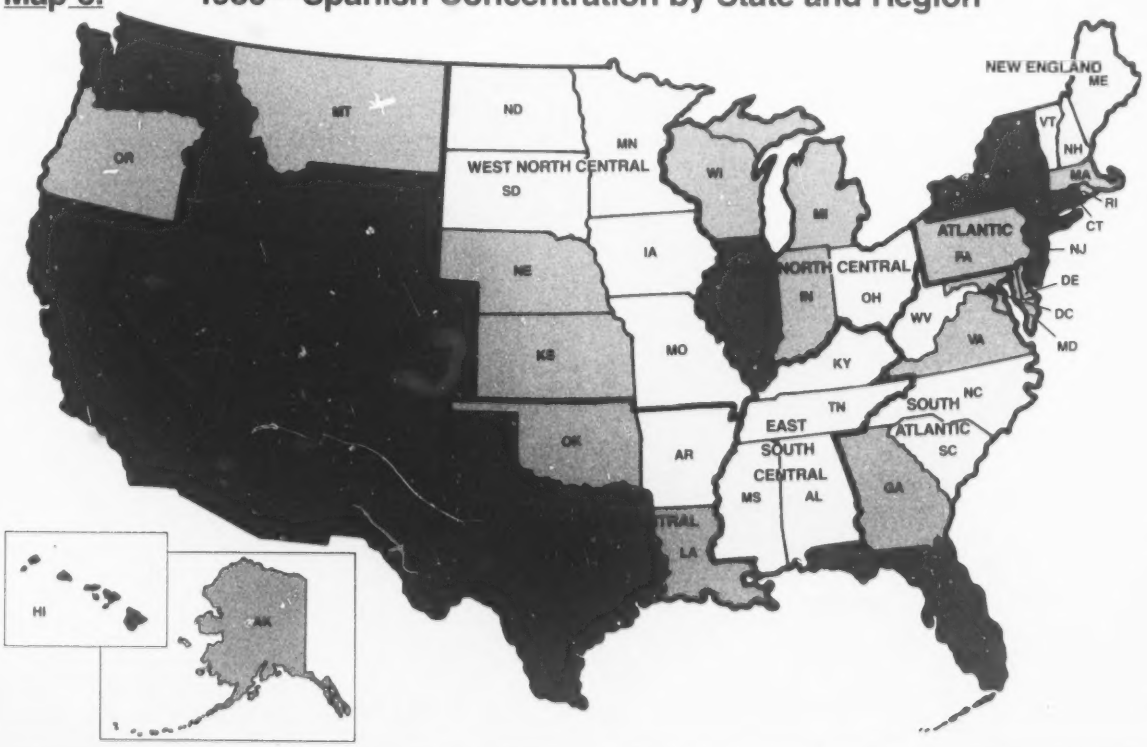
Map 3. 1980—Spanish Concentration by State and Region



Key: Red equals top 17 states in percent of Spanish population
Blue equals middle 17 states in percent Spanish
Yellow equals bottom 17 states in percent Spanish

Restaurants:

Establishments engaged in serving prepared food and beverages selected by the patron from a full menu. Waiter or waitress service is provided and the establishment has seating facilities for at least 15 patrons. These establishments often serve alcoholic beverages. Establishments in which sales of alcoholic beverages for consumption on the premises exceed receipts from sales of prepared foods and nonalcoholic beverages are classified as "Drinking places."

Fast Food:

Establishments primarily selling limited lines of refreshments and prepared food items. Included in this group are establishments which prepare refreshment items such as pizza, barbecued chicken, and hamburgers for consumption either on or near the premises or for "take home" consumption.

Market Share:

Represents the percent of eating places from fast food units or from restaurants. It is indicative of customer preference for these types of establishments in that area.

Restaurant Activity Index (RAI):

The percent of U.S. eating place sales divided by the percent of U.S. food store sales, expressed as an index. An index greater than 100 indicates more than average propensity to eat out rather than at home.

Restaurant Growth Index (RGI):

The weighted percent of U.S. Daytime and Nighttime pop. (DNP), divided by the percent U.S. eating place sales expressed as an index.

The underlying theory behind the RGI is that each market has a certain propensity to eating out. If the demand is met by the supply, an equilibrium exists and the index is 100. If demand exceeds supply—that is, the potential is not being met—the index will exceed 100. And, if the supply exceeds demand, you'll find that the index will fall below 100. The degree to which demand and supply differ is measured in index points.

An index of 110 indicates that one could expect a 10 percent growth in that market, once the appropriate facilities are brought into the supply stream.

However, it is important to understand that RGI is designed as an initial guide—and not the final test—in determining the growth potential of a particular market. Other indices of a market area's potential include: disposable income, number and size of households, age distribution patterns, and ethnic composition—all of which the operator should weigh against his restaurant concept in terms of service level, menu selection, and pricing strategy. *All* the preceding factors must be reviewed to determine a market's growth potential.

Daytime and Nighttime Population (DNP):

This measure includes these separate components—The Daytime population which consists of both (1) the commuting workforce, and (2) transient population, and the Nighttime population which represents (3) the residents in the market.

Television Market:

The TV markets are the American Research Bureau's Areas of Dominant Influence (ADIs). ARB studies each county for its measurable viewing patterns. The hours of viewing accorded each TV station whose signal reached the county are totalled; then each station's percentage share of total viewing hours is calculated. The market of origin of the TV stations with the largest share of viewing hours becomes the ADI name for that market, and all counties whose largest viewing share is given to stations of that same market of origin are grouped within the ADI. (For its purposes, ARB splits certain counties, treating each portion as if it were a separate county). Each county, (or portion) is allocated exclusively to a single ADI; thus overlap is eliminated. All of the area of the U.S. is covered except for Hawaii and part of Alaska.

Standard Metropolitan Statistical Area (SMSA):

Revised criteria by the U.S. Office of Federal Statistical Policy and Standards provide that an SMSA must include either (1) one city with a population of at least 50,000; or (2) one city with a population of at least 25,000, which, when combined with contiguous places having a density of 1,000 or more people per square mile, will have a population of at least 50,000 (provided that the city and contiguous places are in a county or counties with a population of at least 75,000).

Note: 35 new SMSAs have been designated by the U.S. Office of Federal Statistical Policy and Standards, since our last RGI report. (Rapid City, South Dakota, has been dropped as a SMSA.) As a result of the new SMSAs, we have dropped the concept of Potential Metropolitan Areas from this year's report.

A contiguous county is included in an SMSA if at least 75 percent of the resident labor force is nonagricultural, and at least 30 percent of the resident employed workers work in the area. A contiguous county that does not satisfy those requirements will be included if at least 75 percent of the resident labor force is nonagricultural and if it meets at least two criteria of metropolitan character and one criterion of metropolitan integration.

Minimum criteria of character: (1) 25 percent of population is urban; (2) population gain of 15 percent between two most recent decennial censuses; and (3) density of 50 persons per square mile. Minimum criteria of integration: (1) 15 percent of resident employed workers work in the area; (2) 15 percent of the county's employed workers live in the area; and (3) sum of workers commuting to and from the central county or counties is equal to 20 percent of the employed workers living in the county.

SMSAs are defined by the government along county lines except in New England, where towns and cities are the units of definition. The federal government's alternative, but unofficial, New England County Metropolitan Areas, comprised of whole counties rather than cities and towns, are used for those states.

RGI Regional Summary

REGION State	12/31/80 Population (Thous.)	% Of U.S.	Average House-hold Size	1980 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Connecticut	3,109.0	1.3606	2.68	1,143,274	1,039,143	342,980	33	520,152	50	103	111
Maine	1,134.3	0.4964	2.81	349,456	332,765	126,813	38	180,606	54	85	101
Massachusetts	5,741.1	2.5126	2.79	2,480,143	2,234,992	668,705	30	1,208,170	54	109	98
New Hampshire	935.5	0.4094	2.81	350,928	337,495	114,676	34	194,870	58	92	93
Rhode Island	949.6	0.4156	2.77	303,471	267,824	81,875	31	154,549	58	97	97
Vermont	516.6	0.2261	2.83	165,446	152,290	40,403	27	90,840	60	96	126
NEW ENGLAND	**12,386.1**	**5.4207**	**2.79**	**4,792,718**	**4,364,509**	**1,375,452**	**32**	**2,349,187**	**54**	**102**	**103**
New Jersey	7,380.2	3.2299	2.86	2,949,953	2,393,776	790,982	33	1,296,660	54	87	109
New York	17,526.3	7.6702	2.74	6,876,783	6,107,353	1,823,896	30	3,325,867	54	100	110
Pennsylvania	11,873.1	5.1962	2.78	3,993,498	3,331,743	1,231,720	37	1,673,400	50	88	120
MIDDLE ATLANTIC	**36,779.6**	**16.0963**	**2.78**	**13,820,234**	**11,832,872**	**3,846,598**	**32**	**6,295,927**	**53**	**94**	**113**
Illinois	11,452.7	5.0122	2.80	4,879,557	4,245,831	1,634,000	38	2,142,723	50	122	99
Indiana	5,512.9	2.4127	2.82	2,002,868	1,763,928	804,242	46	771,120	44	111	95
Michigan	9,287.9	4.0647	2.86	3,886,662	3,294,865	1,230,430	37	1,709,596	52	113	89
Ohio	10,813.3	4.7324	2.78	4,314,753	3,779,237	1,609,080	43	1,790,846	47	101	93
Wisconsin	4,734.1	2.0718	2.81	2,122,100	1,576,414	520,755	33	948,920	60	108	98
EAST NORTH CENTRAL	**41,800.9**	**18.2938**	**2.81**	**17,205,940**	**14,660,275**	**5,798,507**	**40**	**7,363,205**	**50**	**111**	**94**
Iowa	2,924.5	1.2798	2.74	1,194,375	967,487	395,662	41	499,496	52	104	98
Kansas	2,374.9	1.0394	2.68	951,547	881,678	434,642	49	367,935	42	123	88
Minnesota	4,103.6	1.7959	2.78	1,688,254	1,413,057	478,615	34	837,586	59	122	103
Missouri	4,947.9	2.1655	2.72	1,903,377	1,738,294	752,825	43	778,073	45	112	96
Nebraska	1,579.6	0.6913	2.72	696,552	550,805	211,090	38	299,198	54	120	97
North Dakota	657.1	0.2876	2.83	294,678	215,369	69,914	32	130,933	61	120	98
South Dakota	694.2	0.3038	2.81	302,931	240,478	72,445	30	152,574	63	117	88
WEST NORTH CENTRAL	**17,281.8**	**7.5633**	**2.74**	**7,031,714**	**6,007,168**	**2,415,193**	**40**	**3,065,795**	**51**	**115**	**97**
Delaware	599.4	0.2623	2.83	202,252	186,313	76,306	41	89,796	48	82	106
District of Columbia	628.5	0.2751	2.50	450,959	423,630	127,801	30	205,916	49	275	115
Florida	10,026.0	4.3878	2.58	4,343,399	4,007,283	1,429,344	36	2,165,597	54	99	92
Georgia	5,536.4	2.4230	2.89	1,763,308	1,673,360	860,846	51	623,051	37	91	98
Maryland	4,236.8	1.8542	2.85	1,601,997	1,425,534	639,334	45	587,493	41	87	98
North Carolina	5,930.6	2.5955	2.84	1,556,694	1,501,701	735,187	49	601,792	40	82	107
South Carolina	3,157.7	1.3819	2.99	849,298	810,816	402,776	50	322,275	40	79	106
Virginia	5,399.0	2.3628	2.84	1,753,848	1,709,609	742,580	43	732,313	43	88	100
West Virginia	1,967.2	0.8610	2.82	452,467	412,584	203,008	49	164,236	40	60	125
SOUTH ATLANTIC	**37,481.6**	**16.4036**	**2.78**	**12,974,222**	**12,150,830**	**5,217,182**	**43**	**5,492,469**	**45**	**90**	**100**
Alabama	3,921.9	1.7164	2.87	951,837	911,858	457,637	50	335,189	37	73	110
Kentucky	3,698.4	1.6186	2.87	1,030,048	955,956	487,212	51	379,846	40	69	103
Mississippi	2,540.2	1.1117	3.01	511,115	486,567	257,744	53	168,230	35	57	122
Tennessee	4,640.5	2.0309	2.81	1,264,324	1,197,418	547,259	46	527,913	44	78	115
EAST SOUTH ATLANTIC	**14,801.0**	**6.4776**	**2.87**	**3,757,324**	**3,551,799**	**1,749,852**	**49**	**1,411,178**	**40**	**71**	**112**
Arkansas	2,311.3	1.0116	2.78	534,776	510,967	258,576	51	204,181	40	72	116
Louisiana	4,251.2	1.8605	2.94	1,191,882	1,045,010	448,585	43	421,781	40	75	121
Oklahoma	3,059.5	1.3389	2.68	1,004,657	949,286	456,924	48	368,178	39	88	96
Texas	14,474.8	6.3348	2.86	5,630,431	5,172,580	2,362,131	46	2,105,461	41	101	89
WEST SOUTH CENTRAL	**24,096.8**	**10.5458**	**2.84**	**8,361,746**	**7,677,843**	**3,526,216**	**46**	**3,099,601**	**40**	**93**	**96**
Arizona	2,805.6	1.2278	2.81	854,933	773,299	270,696	35	398,702	52	84	118
Colorado	2,940.4	1.2869	2.69	1,130,653	1,018,674	329,786	32	570,328	56	97	107
Idaho	963.9	0.4218	2.88	280,527	239,566	95,066	40	131,770	55	76	116
Montana	795.3	0.3480	2.74	278,014	201,055	69,826	35	123,105	61	77	133
Nevada	822.0	0.3598	2.60	338,275	284,937	101,626	36	166,400	58	99	468
New Mexico	1,323.1	0.5790	2.91	406,285	358,254	149,277	42	171,233	48	85	112
Utah	1,497.1	0.6552	3.24	311,098	292,545	125,939	43	152,716	52	76	149
Wyoming	482.1	0.2210	2.81	172,770	136,198	51,365	38	80,242	59	77	144
MOUNTAIN	**11,629.5**	**5.0895**	**2.82**	**3,772,555**	**3,304,528**	**1,193,581**	**36**	**1,794,498**	**54**	**86**	**149**
Alaska	410.2	0.1795	3.00	392,886	305,853	82,701	27	115,301	38	147	40
California	23,979.8	10.4945	2.72	11,071,528	10,175,515	3,622,357	36	5,847,768	57	114	87
Hawaii	979.1	0.4285	3.25	653,305	591,368	207,932	35	331,040	56	183	97
Oregon	2,678.4	1.1722	2.63	1,377,582	1,195,662	427,122	36	694,895	58	132	75
Washington	4,192.3	1.8347	2.65	2,097,748	1,858,301	591,759	32	1,131,908	61	125	77
PACIFIC	**32,239.8**	**14.1094**	**2.72**	**15,593,049**	**14,126,699**	**4,931,871**	**35**	**8,120,912**	**57**	**119**	**84**
United States Total	**228,497.1**	**100.0000**	**2.79**	**87,309,502**	**77,676,523**	**30,054,452**	**39**	**38,992,772**	**50**	**100**	**100**

Circle No. 89 ➔

Sales by Metropolitan Area

This segment of the RGI report shows 305 Standard Metropolitan Statistical Areas, which include 35 new SMSAs. As a result, the concept of potential metropolitan areas has been dropped from this year's report.

STATE Metro Name	12/31/80 Population (Thous.)	12/31/80 % Of U.S.	12/31/80 Average Household Size	1980 Eating & Drinking Place Sales ($000)	1980 Eating Place Sales ($000)	1980 Fast Food Sales ($000)	1980 Fast Food Market Share (%)	1980 Restaurant Sales ($000)	1980 Restaurant Market Share (%)	RAI	RGI
ALABAMA											
Anniston	117.8	0.0515	2.93	36,544	35,495	17,924	50	12,848	36	81	72
Birmingham	853.1	0.3733	2.76	278,362	264,856	124,535	47	103,768	39	87	105
Florence	136.2	0.0596	2.82	30,845	30,845	15,577	51	11,166	36	62	101
Gadsden	103.6	0.0453	2.77	28,574	27,294	13,786	51	9,878	36	88	89
Huntsville	310.1	0.1357	2.87	93,575	88,792	44,826	50	33,310	38	90	98
Mobile	447.8	0.1959	2.92	126,334	117,521	58,198	50	42,409	36	83	110
Montgomery	276.0	0.1209	2.91	93,635	89,893	43,333	48	29,878	33	114	99
Tuscaloosa	139.3	0.0609	2.90	40,722	39,290	19,841	50	14,222	36	99	89
Non-Metro Portion of State	1,490.5	0.6525	2.91	214,813	209,834	115,558	55	74,799	36	47	142
State Total	**3,921.9**	**1.7164**	**2.87**	**951,837**	**911,858**	**457,637**	**50**	**335,189**	**37**	**73**	**110**
ALASKA											
Anchorage	177.5	0.0777	2.83	169,240	132,242	49,645	38	60,724	46	132	43
Non-Metro Portion of State	232.7	0.1018	3.15	223,646	173,611	33,056	19	54,577	31	160	37
State Total	**410.2**	**0.1795**	**3.00**	**392,886**	**305,853**	**82,701**	**27**	**115,301**	**38**	**147**	**40**
ARIZONA											
Phoenix	1,559.8	0.6826	2.74	547,952	501,593	174,465	35	249,614	50	94	112
Tucson	549.5	0.2405	2.68	150,397	135,164	52,825	39	66,883	49	74	131
Non-Metro Portion of State	696.3	0.3047	3.09	156,584	136,542	43,406	32	82,205	60	66	126
State Total	**2,805.6**	**1.2278**	**2.81**	**854,933**	**773,299**	**270,696**	**35**	**398,702**	**52**	**84**	**118**
ARKANSAS											
Fayetteville - Springdale	182.1	0.0797	2.74	58,357	56,454	29,569	52	21,894	39	100	83
Fort Smith	206.3	0.0902	2.76	63,112	60,389	31,152	52	23,432	39	84	85
Little Rock - North Little Rock	398.6	0.1745	2.75	126,480	121,619	62,079	51	47,880	39	103	120
Pine Bluff	91.1	0.0399	2.94	21,460	20,321	10,644	52	7,882	39	78	117
Texarkana	128.2	0.0561	2.76	37,774	35,871	17,151	48	14,290	40	70	98
Non-Metro Portion of State	1,404.4	0.6146	2.78	257,358	245,575	121,234	49	100,660	41	59	127
State Total	**2,311.3**	**1.0116**	**2.78**	**534,776**	**510,967**	**258,576**	**51**	**204,181**	**40**	**72**	**116**
CALIFORNIA											
Anaheim - Santa Ana - Garden Grove	1,972.3	0.8632	2.78	1,057,155	1,001,363	359,046	36	590,618	59	129	77
Bakersfield	409.4	0.1792	2.85	158,448	145,246	55,379	38	81,265	56	86	76
Chico	147.2	0.0644	2.50	56,382	49,828	17,791	36	30,386	61	83	80
Fresno	523.7	0.2291	2.85	192,563	173,401	74,955	43	92,075	53	85	90
Los Angeles - Long Beach	7,513.0	3.2881	2.73	3,510,253	3,269,218	1,122,694	34	1,873,504	57	118	89
Modesto	271.8	0.1190	2.78	98,668	89,973	40,986	46	43,085	48	88	85

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STATE Metro Name	12/31/80 Population (Thous.)	% Of U.S.	Average House-hold Size	1980 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
CALIFORNIA *continued*											
Oxnard - Simi Valley - Ventura	542.5	0.2374	3.02	186,782	173,668	72,289	42	96,286	55	86	85
Redding	118.9	0.0521	2.66	41,333	34,715	12,393	36	21,158	61	63	109
Riverside - San Bernardino - Ontario	1,593.2	0.6972	2.80	601,245	551,488	237,058	43	282,405	51	108	84
Sacramento	1,031.2	0.4514	2.60	496,098	451,409	169,163	37	250,119	55	109	76
Salinas - Seaside - Monterey	295.0	0.1291	3.01	137,947	127,877	34,845	27	85,705	67	135	87
San Diego	1,904.9	0.8337	2.75	824,693	749,660	296,786	40	419,536	56	124	90
San Francisco - Oakland	3,266.9	1.4298	2.51	1,837,494	1,655,351	516,926	31	988,113	60	128	93
San Jose	1,314.1	0.5751	2.79	624,713	576,664	220,881	38	308,998	54	117	89
Santa Barbara - Santa Maria - Lompoc	301.6	0.1320	2.70	183,182	172,249	48,821	28	115,829	67	162	69
Santa Cruz	193.4	0.0846	2.61	92,239	84,782	30,745	36	49,748	59	106	67
Santa Rosa	307.5	0.1345	2.59	133,985	118,855	39,568	33	70,435	59	90	78
Stockton	352.3	0.1542	2.76	134,010	118,820	46,507	39	64,829	55	92	84
Vallejo - Fairfield - Napa	341.5	0.1495	2.83	130,840	117,941	42,310	36	70,919	60	102	78
Visalia - Tulare - Porterville	250.8	0.1098	3.03	58,877	52,516	18,753	36	32,007	61	58	106
Yuba City	103.3	0.0451	2.78	32,370	27,515	9,828	36	16,771	61	72	92
Non-Metro Portion of State	1,225.3	0.5360	2.74	482,251	432,976	154,633	36	263,977	61	89	83
State Total	**23,979.8**	**10.4945**	**2.72**	**11,071,528**	**10,175,515**	**3,622,357**	**36**	**5,847,768**	**57**	**114**	**87**
COLORADO											
Colorado Springs	323.3	0 1414	2.83	93,682	86,212	40,583	47	40,002	46	91	131
Denver - Boulder	1,648.6	0.7215	2.62	689,374	621,122	197,852	32	337,801	54	101	107
Fort Collins	153.9	0.0673	2.73	55,963	52,909	17,422	33	29,422	56	104	87
Greeley	126.0	0.0552	2.86	29,706	25,821	8,503	33	14,357	56	83	122
Pueblo	126.3	0.0553	2.76	37,516	31,479	10,366	33	17,505	56	72	125
Non-Metro Portion of State	562.3	0.2462	2.75	224,412	201,131	55,060	27	131,241	65	94	98
State Total	**2,940.4**	**1.2869**	**2.69**	**1,130,653**	**1,018,674**	**329,786**	**32**	**570,328**	**56**	**97**	**107**
CONNECTICUT											
Bridgeport - Stamford - Norwalk - Danbury	807.2	0.3532	2.85	287,914	262,499	70,900	27	149,934	57	97	113
Hartford - New Britain - Bristol	1,051.1	0.4601	2.79	426,283	390,628	135,463	35	172,029	44	112	112
New Haven - West Haven - Waterbury - Meriden	761.4	0.3333	2.77	284,624	260,780	94,678	36	130,721	50	105	105
New London - Norwich	239.0	0.1045	2.88	76,189	65,176	22,226	34	35,655	55	94	112
Non-Metro Portion of State	250.3	0.1095	2.81	68,264	60,060	19,713	33	31,813	53	80	120
State Total	**3,109.0**	**1.3606**	**2.81**	**1,143,274**	**1,039,143**	**342,980**	**33**	**520,152**	**50**	**103**	**111**
DELAWARE											
Wilmington	526.3	0.2303	2.86	170,420	154,152	63,516	41	75,727	49	88	114
Non-Metro Portion of State	199.1	0.0871	2.85	71,153	65,760	24,033	37	34,772	53	75	76
State Total	**599.4**	**0.2623**	**2.83**	**202,252**	**186,313**	**76,306**	**41**	**89,796**	**48**	**82**	**106**
DISTRICT OF COLUMBIA											
Washington	3,071.3	1.3440	2.72	1,440,704	1,380,784	510,729	37	633,912	46	121	105
Non-Metro Portion of State	0.0	0.0000	0.00	0	0	0	0	0	0	0	0
State Total	**628.5**	**0.2751**	**2.50**	**450,959**	**423,630**	**127,801**	**30**	**205,916**	**49**	**275**	**115**
FLORIDA											
Bradenton	152.3	0.0666	2.38	72,896	66,899	24,066	36	35,946	54	98	67
Daytona Beach	265.4	0.1161	2.43	144,495	131,239	45,329	35	71,397	54	134	86

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STATE Metro Name	12/31/80 Population (Thous.)	12/31/80 % Of U.S.	12/31/80 Average Household Size	1980 Eating & Drinking Place Sales ($000)	1980 Eating Place Sales ($000)	1980 Fast Food Sales ($000)	1980 Fast Food Market Share (%)	1980 Restaurant Sales ($000)	1980 Restaurant Market Share (%)	RAI	RGI
FLORIDA *continued*											
Fort Lauderdale - Hollywood	1,042.8	0.4564	2.42	626,443	580,067	166,851	29	366,048	63	125	72
Fort Myers - Cape Coral	212.7	0.0931	2.46	91,359	85,565	30,782	36	45,976	54	83	87
Fort Walton Beach	111.6	0.0488	2.88	45,875	43,608	17,626	40	23,928	55	123	80
Gainesville	155.0	0.0678	2.73	74,561	70,244	25,269	36	37,743	54	122	60
Jacksonville	746.9	0.3268	2.76	263,183	246,712	123,423	50	100,108	41	92	106
Lakeland - Winter Haven	328.0	0.1436	2.78	115,473	108,691	48,743	45	47,518	44	84	85
Melbourne - Titusville - Cocoa	276.1	0.1208	2.63	119,964	108,979	43,443	40	55,762	51	111	83
Miami	1,719.2	0.7524	2.70	745,573	693,301	207,593	30	387,548	56	110	110
Ocala	126.5	0.0554	2.66	44,399	41,403	16,705	40	22,719	55	79	80
Orlando	719.4	0.3148	2.74	339,097	320,790	135,667	42	152,921	48	105	110
Panama City	99.3	0.0435	2.77	54,522	49,782	17,909	36	26,748	54	158	73
Pensacola	293.3	0.1283	2.87	96,512	83,490	41,570	50	31,664	38	84	94
Sarasota	208.3	0.0912	2.26	133,771	125,844	34,111	27	77,151	61	131	63
Tallahassee	163.5	0.0716	2.72	69,468	65,433	23,540	36	35,160	54	105	79
Tampa - St. Petersburg	1,605.0	0.7023	2.44	687,245	628,945	235,773	37	316,258	50	88	89
West Palm Beach - Boca Raton	589.6	0.2581	2.43	282,519	253,613	68,686	27	164,710	65	95	92
Non-Metro Portion of State	1,211.1	0.5302	2.63	336,044	302,678	122,258	40	166,292	55	64	105
State Total	**10,026.0**	**4.3878**	**2.59**	**4,343,399**	**4,007,283**	**1,429,344**	**36**	**2,165,597**	**54**	**99**	**92**
GEORGIA											
Albany	114.1	0.0499	3.03	30,403	29,329	14,956	51	11,114	38	93	109
Athens	131.8	0.0577	2.82	45,774	43,802	25,071	57	15,328	35	112	74
Atlanta	2,064.2	0.9034	2.79	911,301	865,584	420,877	49	326,125	38	122	95
Augusta	332.0	0.1453	2.97	100,844	93,301	44,285	47	41,321	44	90	89
Columbus	239.2	0.1047	3.02	73,648	68,417	34,976	51	25,639	37	104	88
Macon	256.9	0.1125	2.91	83,335	78,930	40,428	51	29,727	38	91	93
Savannah	232.9	0.1019	2.84	87,970	80,175	41,043	51	30,187	38	107	93
Non-Metro Portion of State	2,212.5	0.9683	2.96	443,317	426,269	244,381	57	148,906	35	58	112
State Total	**5,536.4**	**2.4230**	**2.89**	**1,763,308**	**1,673,360**	**860,846**	**51**	**623,051**	**37**	**91**	**98**
HAWAII											
Honolulu	772.1	0.3379	3.28	535,818	479,126	176,745	37	256,503	54	211	87
Non-Metro Portion of State	207.0	0.0906	3.14	117,487	112,242	31,187	28	74,537	66	118	140
State Total	**979.1**	**0.4285**	**3.25**	**653,305**	**591,368**	**207,932**	**35**	**331,040**	**56**	**183**	**97**
IDAHO											
Boise	178.1	0.0779	2.71	86,837	79,449	31,365	39	43,232	54	114	80
Non-Metro Portion of State	785.8	0.3439	2.93	193,690	160,117	63,701	40	88,538	55	65	134
State Total	**963.9**	**0.4218**	**2.89**	**280,527**	**239,566**	**95,066**	**40**	**131,770**	**55**	**76**	**116**
ILLINOIS											
Bloomington - Normal	120.4	0.0526	2.83	57,477	50,448	19,633	39	25,215	50	133	95
Champaign - Urbana - Rantoul	168.8	0.0739	2.84	95,958	84,912	33,048	39	42,440	50	162	65
Chicago	7,118.1	3.1152	2.83	3,238,332	2,893,192	1,040,410	36	1,500,696	52	136	99
Davenport - Rock Island - Moline	386.1	0.1690	2.75	193,085	158,343	67,223	42	76,054	48	129	84
Decatur	131.9	0.0578	2.70	54,867	44,115	17,171	39	22,049	50	92	106
Kankakee	103.7	0.0454	2.91	45,179	39,491	15,370	39	19,738	50	135	81
Peoria	368.1	0.1611	2.77	164,093	138,545	63,328	46	63,515	46	112	97
Rockford	280.1	0.1225	2.79	115,969	101,688	35,291	35	57,551	57	117	93
Springfield	189.3	0.0829	2.57	86,114	73,109	28,464	39	36,555	50	104	112
Non-Metro Portion of State	2,183.3	0.9556	2.72	710,172	574,781	260,258	45	267,122	46	89	104
State Total	**11,452.7**	**5.0122**	**2.80**	**4,879,557**	**4,245,831**	**1,634,000**	**38**	**2,142,723**	**50**	**122**	**99**

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STATE Metro Name	12/31/80 Population (Thous.)	12/31/80 % Of U.S.	12/31/80 Average Household Size	1980 Eating & Drinking Place Sales ($000)	1980 Eating Place Sales ($000)	1980 Fast Food Sales ($000)	1980 Fast Food Market Share (%)	1980 Restaurant Sales ($000)	1980 Restaurant Market Share (%)	1980 RAI	1980 RGI
INDIANA											
Anderson	139.3	0.0609	2.76	53,239	45,941	21,510	47	19,566	43	110	86
Bloomington	99.2	0.0434	2.87	37,337	33,982	15,909	47	14,472	43	129	81
Elkhart	138.2	0.0604	2.83	62,766	54,578	24,081	44	24,788	45	116	80
Evansville	311.7	0.1365	2.69	128,671	109,361	52,379	48	44,272	40	124	97
Fort Wayne	384.8	0.1684	2.82	179,999	160,366	60,801	38	88,457	55	149	83
Gary - Hammond - East Chicago	643.9	0.2818	2.97	263,075	231,040	104,891	45	107,501	47	107	83
Indianapolis	1,171.4	0.5125	2.76	457,219	421,321	208,246	49	155,502	37	118	100
Kokomo	103.9	0.0455	2.76	43,231	38,105	17,841	47	16,231	43	119	78
Lafayette - West Lafayette	122.2	0.0534	2.95	53,672	48,907	22,898	47	20,832	43	150	81
Muncie	128.4	0.0562	2.85	49,423	43,725	20,469	47	18,622	43	119	83
South Bend	280.7	0.1228	2.78	121,116	105,719	42,247	40	51,806	49	134	93
Terre Haute	176.8	0.0773	2.72	62,205	51,942	24,321	47	22,124	43	114	93
Non-Metro Portion of State	1,667.6	0.7302	2.84	439,365	375,573	165,761	44	170,301	45	85	111
State Total	**5,512.9**	**2.4127**	**2.82**	**2,002,868**	**1,763,928**	**804,242**	**46**	**771,120**	**44**	**111**	**95**
IOWA											
Cedar Rapids	170.4	0.0746	2.71	85,815	70,631	28,473	40	35,957	51	122	90
Davenport - Rock Island - Moline	386.1	0.1690	2.75	193,085	158,343	67,223	42	76,054	48	129	84
Des Moines	340.4	0.1489	2.65	177,586	153,024	63,403	41	69,091	45	111	105
Dubuque	94.1	0.0412	3.08	45,875	36,908	14,877	40	18,790	51	122	95
Iowa City	82.5	0.0361	2.67	44,842	37,187	15,139	41	20,123	54	139	71
Sioux City	117.8	0.0514	2.75	53,913	42,939	17,253	40	21,982	51	98	103
Waterloo - Cedar Falls	138.6	0.0606	2.83	64,318	51,507	20,765	40	26,221	51	110	90
Non-Metro Portion of State	1,749.3	0.7656	2.73	599,464	474,410	193,265	41	256,919	54	92	103
State Total	**2,924.5**	**1.2798**	**2.74**	**1,194,375**	**967,487**	**395,662**	**41**	**499,496**	**52**	**104**	**98**
KANSAS											
Lawrence	68.4	0.0299	2.80	26,341	23,161	11,575	50	9,512	41	131	78
Topeka	186.1	0.0815	2.63	77,000	70,841	35,403	50	29,091	41	115	100
Wichita	413.5	0.1809	2.64	233,211	218,825	111,285	51	83,148	38	170	73
Non-Metro Portion of State	1,261.3	0.5521	2.68	398,630	361,431	168,951	47	169,002	47	97	100
State Total	**2,374.9**	**1.0394**	**2.68**	**951,547**	**881,678**	**434,642**	**49**	**367,935**	**42**	**123**	**88**
KENTUCKY											
Clarksville - Hopkinsville	153.0	0.0669	3.17	39,867	36,839	17,698	48	15,534	42	90	88
Huntington - Ashland	313.3	0.1370	2.78	78,182	71,848	41,401	58	23,715	33	66	117
Lexington-Fayette	322.2	0.1412	2.76	134,066	126,822	65,969	52	46,254	36	94	88
Louisville	909.1	0.3979	2.76	396,130	355,825	180,866	51	133,736	38	103	91
Owensboro	86.5	0.0379	2.81	31,464	27,935	14,370	51	10,964	39	83	92
Non-Metro Portion of State	2,059.4	0.9011	2.92	377,231	361,499	191,370	53	147,684	41	50	121
State Total	**3,698.4**	**1.6186**	**2.87**	**1,030,048**	**955,956**	**487,212**	**51**	**379,846**	**40**	**69**	**103**
LOUISIANA											
Alexandria	153.6	0.0672	2.98	28,523	26,388	11,620	44	10,506	40	64	148
Baton Rouge	503.5	0.2204	2.97	140,970	124,712	63,661	51	50,690	41	72	125
Lafayette	153.1	0.0670	2.93	58,091	51,372	22,608	44	20,430	40	94	98
Lake Charles	168.9	0.0740	2.93	53,011	48,019	21,133	44	19,096	40	68	102
Monroe	140.9	0.0617	2.91	38,033	34,620	15,233	44	13,768	40	79	122
New Orleans	1,199.0	0.5247	2.80	473,103	410,236	163,133	40	188,823	46	93	121
Shreveport	379.6	0.1661	2.80	112,978	103,825	48,810	47	38,652	37	96	111
Non-Metro Portion of State	1,552.6	0.6794	3.09	287,173	245,838	102,387	42	79,816	32	54	127
State Total	**4,251.2**	**1.8605**	**2.94**	**1,191,882**	**1,045,010**	**448,585**	**43**	**421,781**	**40**	**75**	**121**

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Circle No. 93 ➔

STATE Metro Name	12/31/80 Population (Thous.)	% Of U.S.	Average House-hold Size	1980 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
MAINE											
Bangor	137.9	0.0604	2.95	39,436	37,057	14,120	38	20,109	54	74	111
Lewiston - Auburn	100.2	0.0438	2.80	32,817	30,847	11,752	38	16,739	54	95	90
Portland	246.5	0.1079	2.72	88,635	85,347	32,533	38	46,331	54	87	106
Non-Metro Portion of State	507.5	0.2221	2.83	133,171	126,124	48,066	38	68,454	54	75	109
State Total	**1,134.3**	**0.4964**	**2.81**	**349,456**	**332,765**	**126,813**	**38**	**180,606**	**54**	**85**	**101**
MARYLAND											
Baltimore	2,180.6	0.9543	2.84	847,013	720,148	325,592	45	277,832	39	86	100
Cumberland	107.7	0.0471	2.74	31,059	27,965	12,144	43	13,310	48	81	92
Hagerstown	113.6	0.0497	2.80	33,800	28,257	12,119	43	13,560	48	69	114
Non-Metro Portion of State	478.9	0.2096	2.90	165,437	150,350	64,466	43	72,167	48	87	87
State Total	**4,236.8**	**1.8542**	**2.85**	**1,601,997**	**1,425,534**	**639,334**	**45**	**587,493**	**41**	**87**	**98**
MASSACHUSETTS											
Boston - Lowell - Brockton - Lawrence - Haverhill	3,658.5	1.6011	2.79	1,657,696	1,503,399	439,225	29	817,049	54	122	101
New Bedford - Fall River	477.3	0.2088	2.82	173,717	154,525	61,394	40	74,526	48	95	84
Pittsfield	144.5	0.0633	2.74	51,829	43,060	15,712	36	22,684	53	67	132
Springfield - Chicopee - Holyoke	581.9	0.2547	2.85	207,752	178,798	55,165	31	88,718	50	71	111
Worcester - Fitchburg - Leominster	647.5	0.2834	2.84	206,537	184,847	57,823	31	91,774	50	81	113
Non-Metro Portion of State	231.4	0.1013	2.52	182,612	170,363	39,386	23	113,419	67	158	55
State Total	**5,741.1**	**2.5126**	**2.79**	**2,480,143**	**2,234,992**	**668,705**	**30**	**1,208,170**	**54**	**109**	**98**
MICHIGAN											
Ann Arbor	267.4	0.1170	2.81	133,940	122,372	46,379	38	63,040	52	226	78
Battle Creek	187.9	0.0822	2.78	70,444	61,231	23,210	38	31,545	52	143	92
Bay City	120.0	0.0526	2.86	46,968	35,654	13,516	38	18,366	52	93	96
Benton Harbor	171.7	0.0752	2.81	67,728	56,706	20,411	36	33,076	58	92	85
Detroit	4,345.0	1.9016	2.85	1,969,436	1,709,742	640,105	37	852,109	50	109	89
Flint	522.6	0.2287	2.89	206,496	171,872	68,856	40	81,732	48	103	89
Grand Rapids	607.1	0.2656	2.88	266,098	232,969	71,678	31	141,301	61	188	83
Jackson	152.0	0.0666	2.94	46,800	39,935	15,136	38	20,573	52	137	108
Kalamazoo - Portage	281.2	0.1230	2.80	113,919	99,211	39,406	40	52,255	53	140	88
Lansing - East Lansing	472.4	0.2066	2.91	192,034	161,607	71,448	44	74,750	46	129	88
Muskegon - Norton Shores - Muskegon Heights	179.8	0.0787	2.86	60,466	51,121	19,380	38	26,334	52	119	88
Saginaw	228.7	0.1001	2.96	122,001	102,664	38,914	38	52,892	52	134	70
Non-Metro Portion of State	1,616.3	0.7074	2.87	560,563	425,034	153,082	36	248,148	58	87	94
State Total	**9,287.9**	**4.0647**	**2.86**	**3,886,662**	**3,294,865**	**1,230,430**	**37**	**1,709,596**	**52**	**113**	**89**
MINNESOTA											
Duluth - Superior	267.2	0.1169	2.69	106,183	80,767	28,325	35	48,059	60	98	107
Fargo - Moorhead	139.0	0.0608	2.77	91,262	71,945	24,317	34	43,101	60	165	76
Minneapolis - St. Paul	2,127.6	0.9311	2.73	1,010,199	868,185	308,579	36	495,467	57	137	102
Rochester	92.7	0.0406	2.78	45,784	40,796	13,859	34	24,172	59	134	141
St. Cloud	165.9	0.0726	3.27	55,484	43,190	14,673	34	25,593	59	141	97
Non-Metro Portion of State	1,455.1	0.6369	2.83	461,473	369,843	110,051	30	238,094	64	99	104
State Total	**4,103.6**	**1.7959**	**2.78**	**1,688,254**	**1,413,057**	**478,615**	**34**	**837,586**	**59**	**122**	**103**
MISSISSIPPI											
Biloxi - Gulfport	194.2	0.0850	2.99	62,434	56,857	30,641	54	19,618	35	87	104
Jackson	325.2	0.1423	2.94	120,072	116,122	55,469	48	33,194	29	102	100

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STATE Metro Name	12/31/80 Population (Thous.)	% Of U.S.	Average House-hold Size	1980 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
MISSISSIPPI *continued*											
Pascagoula - Moss Point	120.2	0.0526	3.11	25,660	23,567	12,702	54	8,131	35	56	141
Non-Metro Portion of State	1,844.9	0.8075	3.02	296,916	283,988	155,809	55	105,039	37	47	132
State Total	**2,540.2**	**1.1117**	**3.01**	**511,115**	**486,567**	**257,744**	**53**	**168,230**	**35**	**57**	**122**
MISSOURI											
Columbia	102.7	0.0449	2.81	53,841	51,392	22,148	43	23,199	45	173	72
Joplin	128.7	0.0563	2.62	48,022	44,585	19,587	44	22,093	50	115	75
Kansas City	1,332.5	0.5833	2.66	664,756	622,822	283,527	46	261,169	42	146	87
St. Joseph	102.3	0.0448	2.68	39,706	34,893	15,039	43	15,751	45	110	92
St. Louis	2,358.1	1.0318	2.78	1,012,043	895,251	400,540	45	381,352	43	110	97
Springfield	210.9	0.0924	2.67	96,575	90,708	42,839	47	36,159	40	140	78
Non-Metro Portion of State	1,722.9	0.7540	2.73	410,348	366,017	161,260	44	182,261	50	78	111
State Total	**4,947.9**	**2.1655**	**2.72**	**1,903,377**	**1,738,294**	**752,825**	**43**	**778,073**	**45**	**112**	**96**
MONTANA											
Billings	110.4	0.0483	2.67	47,488	38,624	13,496	35	23,416	61	83	117
Great Falls	80.6	0.0353	2.71	32,141	23,199	8,107	35	14,066	61	86	130
Non-Metro Portion of State	604.3	0.2644	2.76	198,385	139,232	48,223	35	85,623	61	74	137
State Total	**795.3**	**0.3480**	**2.74**	**278,014**	**201,055**	**69,826**	**35**	**123,105**	**61**	**77**	**133**
NEBRASKA											
Lincoln	195.1	0.0854	2.65	110,463	95,650	37,548	39	50,891	53	153	78
Omaha	573.4	0.2510	2.77	290,689	235,442	91,503	39	123,292	52	136	98
Non-Metro Portion of State	880.8	0.3855	2.70	330,724	247,847	93,643	38	140,487	57	101	100
State Total	**1,579.6**	**0.6913**	**2.72**	**696,552**	**550,805**	**211,090**	**38**	**299,198**	**54**	**120**	**97**
NEVADA											
Las Vegas	475.7	0.2082	2.63	200,842	165,632	58,911	36	96,581	58	93	542
Reno	199.0	0.0870	2.48	92,562	82,927	29,632	36	48,479	58	115	285
Non-Metro Portion of State	147.3	0.0646	2.67	44,871	36,378	13,083	36	21,340	59	98	544
State Total	**822.0**	**0.3598**	**2.60**	**338,275**	**284,937**	**101,626**	**36**	**166,400**	**58**	**99**	**468**
NEW HAMPSHIRE											
Manchester - Nashua	280.8	0.1228	2.86	100,447	95,031	32,636	34	53,751	57	98	100
Portsmouth - Dover - Rochester	423.3	0.1852	2.84	174,345	168,541	59,304	35	95,993	57	104	71
Non-Metro Portion of State	373.6	0.1636	2.75	131,533	127,313	43,078	34	74,099	58	85	109
State Total	**935.5**	**0.4094**	**2.81**	**350,928**	**337,495**	**114,676**	**34**	**194,870**	**58**	**92**	**93**
NEW JERSEY											
Atlantic City	195.4	0.0855	2.69	116,924	93,805	31,651	34	56,748	60	117	202
Jersey City	555.0	0.2429	2.66	151,609	105,917	36,775	35	53,366	50	62	155
Long Branch - Asbury Park	506.1	0.2215	2.93	223,375	184,682	59,618	32	108,474	59	96	86
Newark	1,958.7	0.8572	2.88	749,873	609,507	185,243	30	320,196	53	83	118
New Brunswick - Perth Amboy - Sayreville	595.8	0.2608	2.99	225,927	173,681	74,341	43	75,770	44	82	108
Paterson - Clifton - Passaic	446.1	0.1953	2.90	168,709	138,271	41,801	30	74,737	54	110	101
Trenton	307.9	0.1347	2.89	120,133	92,001	30,350	33	48,161	52	78	138
Vineland - Millville - Bridgeton	133.5	0.0584	2.98	44,625	34,561	11,494	33	18,638	54	53	107
Non-Metro Portion of State	648.3	0.2836	2.77	297,013	238,063	68,885	29	153,012	64	81	86
State Total	**7,380.2**	**3.2299**	**2.86**	**2,949,953**	**2,393,776**	**790,982**	**33**	**1,296,660**	**54**	**87**	**109**

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STATE Metro Name	12/31/80 Population (Thous.)	12/31/80 % Of U.S.	12/31/80 Average Household Size	1980 Eating & Drinking Place Sales ($000)	1980 Eating Place Sales ($000)	1980 Fast Food Sales ($000)	1980 Fast Food Market Share (%)	1980 Restaurant Sales ($000)	1980 Restaurant Market Share (%)	1980 RAI	1980 RGI
NEW MEXICO											
Albuquerque	464.2	0.2031	2.77	170,465	153,474	62,792	41	69,512	45	111	108
Las Cruces	98.3	0.0430	3.12	26,275	21,907	9,151	42	10,888	50	86	107
Non-Metro Portion of State	760.5	0.3329	2.97	209,545	182,873	77,334	42	90,833	50	72	115
State Total	**1,323.1**	**0.5790**	**2.91**	**406,285**	**358,254**	**149,277**	**42**	**171,233**	**48**	**85**	**112**
NEW YORK											
Albany - Schenectady - Troy	796.0	0.3483	2.74	347,488	299,827	92,270	31	163,379	54	99	92
Binghamton	300.9	0.1318	2.80	106,536	89,380	30,387	34	49,130	55	86	92
Buffalo	1,233.3	0.5398	2.76	573,278	475,611	162,040	34	249,475	52	91	85
Elmira	97.4	0.0426	2.80	31,183	25,922	7,729	30	14,118	54	71	112
Glens Falls	110.1	0.0482	2.91	51,848	46,233	14,714	32	26,280	57	92	78
Nassau - Suffolk	2,611.5	1.1430	3.19	1,009,609	932,178	288,479	31	478,300	51	93	91
Newburgh - Middletown	262.8	0.1150	3.06	86,052	75,625	22,712	30	44,171	58	61	92
New York	9,078.0	3.9727	2.59	3,625,117	3,286,718	932,002	28	1,823,258	55	114	124
Poughkeepsie	247.0	0.1081	3.01	78,584	69,444	20,708	30	37,817	54	64	99
Rochester	972.0	0.4254	2.81	381,479	334,055	105,605	32	181,354	54	90	100
Syracuse	642.4	0.2812	2.84	277,131	239,071	72,354	30	124,563	52	86	95
Utica - Rome	318.6	0.1395	2.84	127,122	105,831	40,448	38	49,142	46	87	86
Non-Metro Portion of State	1,736.6	0.7599	2.89	596,929	491,651	156,473	32	279,434	57	80	107
State Total	**17,526.3**	**7.6702**	**2.74**	**6,876,783**	**6,107,353**	**1,823,896**	**30**	**3,325,867**	**54**	**100**	**110**
NORTH CAROLINA											
Asheville	178.9	0.0784	2.66	57,938	54,685	26,854	49	21,967	40	93	107
Burlington	99.1	0.0434	2.72	28,094	27,409	13,457	49	11,010	40	81	103
Charlotte - Gastonia	642.8	0.2814	2.78	221,856	214,449	104,450	49	84,377	39	92	108
Fayetteville	250.4	0.1096	3.26	64,918	59,039	28,993	49	23,717	40	98	94
Greensboro - Winston-Salem - High Point	834.2	0.3649	2.74	282,720	274,307	121,621	44	101,342	37	105	97
Hickory	131.5	0.0575	2.80	43,271	42,198	22,162	53	17,130	41	100	84
Jacksonville	113.8	0.0498	3.67	27,432	23,886	12,545	53	9,816	41	135	74
Raleigh - Durham	538.8	0.2358	2.77	202,599	196,761	86,767	44	82,315	42	109	101
Salisbury - Concord	186.6	0.0816	2.75	42,294	40,251	21,134	53	16,538	41	74	109
Wilmington	141.5	0.0619	2.75	50,187	48,215	23,675	49	19,368	40	91	85
Non-Metro Portion of State	2,801.6	1.2262	2.88	534,450	519,625	273,056	53	213,866	41	62	121
State Total	**5,930.6**	**2.5955**	**2.84**	**1,556,694**	**1,501,701**	**735,187**	**49**	**601,792**	**40**	**82**	**107**
NORTH DAKOTA											
Bismarck	81.6	0.0358	2.82	41,575	34,036	10,715	31	20,708	61	121	95
Fargo - Moorhead	139.0	0.0608	2.77	91,262	71,945	24,317	34	43,101	60	165	76
Grand Forks	101.4	0.0444	2.91	50,370	37,112	12,539	34	22,243	60	141	88
Non-Metro Portion of State	419.3	0.1834	2.84	152,137	100,675	31,989	32	61,831	61	94	117
State Total	**657.1**	**0.2876**	**2.83**	**294,678**	**215,369**	**69,914**	**32**	**130,933**	**61**	**120**	**98**
OHIO											
Akron	658.8	0.2882	2.79	292,934	259,295	109,015	42	133,949	52	100	82
Canton	405.2	0.1773	2.81	168,959	147,568	60,751	41	74,316	50	92	83
Cincinnati	1,403.3	0.6141	2.78	654,237	584,004	249,852	43	265,128	45	112	86
Cleveland	1,888.7	0.8265	2.70	832,389	726,206	268,246	37	376,176	52	103	100
Columbus	1,099.3	0.4812	2.72	530,454	476,202	218,436	46	214,467	45	131	86
Dayton	828.7	0.3627	2.73	343,394	309,142	144,462	47	135,069	44	115	90
Hamilton - Middletown	261.2	0.1143	2.91	87,340	73,464	45,016	61	23,578	32	78	99
Lima	219.0	0.0958	2.89	79,163	71,767	30,760	43	33,796	47	109	87
Lorain - Elyria	276.3	0.1210	2.99	77,712	61,750	28,081	45	27,716	45	70	126
Mansfield	131.2	0.0574	2.79	48,064	41,706	17,874	43	19,639	47	97	93
Newark	121.9	0.0534	2.83	37,236	32,388	13,930	43	15,281	47	92	103

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STATE Metro Name	12/31/80 Population (Thous.)	12/31/80 % Of U.S.	12/31/80 Average House-hold Size	1980 Eating & Drinking Place Sales ($000)	1980 Eating Place Sales ($000)	1980 Fast Food Sales ($000)	1980 Fast Food Market Share (%)	1980 Restaurant Sales ($000)	1980 Restaurant Market Share (%)	1980 RAI	1980 RGI
OHIO *continued*											
Parkersburg - Marietta	164.2	0.0719	2.79	52,068	47,091	21,530	46	20,475	43	73	103
Springfield	183.5	0.0803	2.79	52,116	46,890	20,096	43	22,076	47	76	116
Steubenville - Weirton	162.6	0.0711	2.80	44,345	35,194	15,830	45	15,619	44	63	135
Toledo	794.7	0.3477	2.82	343,855	300,750	117,156	39	149,563	50	110	87
Youngstown - Warren	530.7	0.2322	2.81	191,761	162,653	72,597	45	75,448	46	87	100
Non-Metro Portion of State	2,146.2	0.9395	2.88	624,030	531,787	228,713	43	250,976	47	80	100
State Total	**10,813.3**	**4.7324**	**2.79**	**4,314,753**	**3,779,237**	**1,609,080**	**43**	**1,790,846**	**47**	**101**	**93**
OKLAHOMA											
Enid	63.4	0.0278	2.61	27,743	26,601	12,688	48	10,865	41	114	74
Lawton	112.9	0.0494	3.17	29,876	27,438	13,187	48	10,674	39	89	93
Oklahoma City	843.7	0.3693	2.65	392,480	369,038	182,344	49	134,570	36	116	84
Tulsa	699.6	0.3061	2.65	238,832	227,547	106,093	47	87,158	38	89	107
Non-Metro Portion of State	1,267.3	0.5546	2.69	303,963	287,487	137,238	48	120,566	42	67	105
State Total	**3,059.5**	**1.3389**	**2.68**	**1,004,657**	**949,286**	**456,924**	**48**	**368,178**	**39**	**88**	**96**
OREGON											
Eugene - Springfield	279.9	0.1225	2.62	128,679	113,392	48,138	42	56,390	50	113	81
Medford	135.4	0.0593	2.68	59,117	51,209	17,850	35	31,479	61	100	78
Portland	1,262.8	0.5527	2.58	714,042	616,102	217,501	35	352,327	57	163	79
Salem	255.3	0.1118	2.73	114,435	100,772	36,058	36	58,235	58	151	71
Non-Metro Portion of State	942.5	0.4124	2.70	436,283	377,210	131,566	35	231,966	61	104	71
State Total	**2,678.4**	**1.1722**	**2.63**	**1,377,582**	**1,195,662**	**427,122**	**36**	**694,895**	**58**	**132**	**75**
PENNSYLVANIA											
Allentown - Bethlehem - Easton	640.0	0.2803	2.73	225,911	197,262	77,748	39	89,056	45	83	101
Altoona	136.7	0.0598	2.76	46,059	39,657	14,738	37	19,863	50	79	98
Erie	281.0	0.1230	2.86	88,973	72,062	31,886	44	34,141	47	107	126
Harrisburg	448.7	0.1963	2.71	191,634	163,420	69,910	43	76,903	47	92	109
Johnstown	264.8	0.1159	2.65	68,391	52,998	26,693	50	21,268	40	65	149
Lancaster	365.5	0.1600	2.90	118,600	105,040	39,762	38	59,002	56	91	114
Northeast Pennsylvania	641.8	0.2808	2.73	207,703	175,618	62,281	35	86,586	49	84	123
Philadelphia	4,709.8	2.0613	2.85	1,767,731	1,475,352	522,162	35	747,064	51	101	118
Pittsburgh	2,253.5	0.9863	2.70	835,387	679,575	229,362	34	357,139	53	94	118
Reading	314.1	0.1375	2.71	117,110	102,035	38,355	33	56,196	55	105	102
Sharon	128.3	0.0561	2.84	40,353	33,161	12,883	39	17,106	52	81	110
State College	113.6	0.0497	3.08	40,697	38,508	14,956	39	19,860	52	85	78
Williamsport	118.9	0.0521	2.78	29,829	23,177	8,615	37	11,608	50	55	156
York	385.1	0.1686	2.80	119,535	103,098	45,006	44	47,291	46	79	109
Non-Metro Portion of State	2,159.4	0.9448	2.83	512,447	413,909	160,820	39	213,484	52	66	132
State Total	**11,873.1**	**5.1962**	**2.78**	**3,993,498**	**3,331,743**	**1,231,720**	**37**	**1,673,400**	**50**	**88**	**120**
RHODE ISLAND											
Providence - Warwick - Pawtucket	867.8	0.3798	2.76	265,773	236,592	73,062	31	135,331	57	92	121
Non-Metro Portion of State	81.8	0.0358	2.85	37,698	31,232	8,813	28	19,218	62	154	84
State Total	**949.6**	**0.4156**	**2.77**	**303,471**	**267,824**	**81,875**	**31**	**154,549**	**58**	**97**	**117**
SOUTH CAROLINA											
Anderson	135.3	0.0592	2.81	31,598	30,198	14,537	48	13,079	43	58	107
Charleston - North Charleston	436.8	0.1914	3.08	130,248	123,190	61,855	50	42,864	35	93	92
Columbia	414.7	0.1816	3.02	135,654	128,745	64,214	50	47,732	37	95	102
Florence	111.7	0.0489	3.05	25,643	25,140	12,106	48	10,893	43	69	137

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STATE Metro Name	12/31/80 Population (Thous.)	12/31/80 % Of U.S.	12/31/80 Average Household Size	1980 Eating & Drinking Place Sales ($000)	1980 Eating Place Sales ($000)	1980 Fast Food Sales ($000)	1980 Fast Food Market Share (%)	1980 Restaurant Sales ($000)	1980 Restaurant Market Share (%)	RAI	RGI
SOUTH CAROLINA *continued*											
Greenville - Spartanburg	575.4	0.2518	2.85	196,519	188,767	98,582	52	71,232	38	91	89
Rock Hill	108.4	0.0474	3.03	36,848	34,932	16,820	48	15,125	43	96	76
Non-Metro Portion of State	1,268.6	0.5548	3.05	274,320	262,308	126,341	48	113,585	43	68	124
State Total	**3,157.7**	**1.3819**	**2.99**	**849,298**	**810,816**	**402,776**	**50**	**322,275**	**40**	**79**	**106**
SOUTH DAKOTA											
Sioux Falls	110.6	0.0484	2.69	68,129	58,369	19,267	33	35,661	61	165	81
Non-Metro Portion of State	583.6	0.2554	2.84	234,802	182,109	53,178	29	116,913	64	108	91
State Total	**694.2**	**0.3038**	**2.81**	**302,931**	**240,478**	**72,445**	**30**	**152,574**	**63**	**117**	**88**
TENNESSEE											
Chattanooga	430.4	0.1886	2.80	120,820	115,084	54,036	47	52,521	46	81	115
Clarksville - Hopkinsville	153.0	0.0669	3.17	39,867	36,839	17,698	48	15,534	42	90	88
Johnson City - Kingsport - Bristol	437.7	0.1915	2.78	108,816	105,124	59,083	56	31,692	30	72	100
Knoxville	481.5	0.2108	2.70	142,979	133,860	69,281	52	50,976	38	83	123
Memphis	919.5	0.4024	2.89	269,691	253,766	114,883	45	105,738	42	77	126
Nashville-Davidson	862.2	0.3775	2.79	326,423	311,892	123,352	40	153,830	49	102	103
Non-Metro Portion of State	1,727.2	0.7555	2.83	319,334	301,505	141,611	47	139,509	46	57	126
State Total	**4,640.5**	**2.0309**	**2.81**	**1,264,324**	**1,197,418**	**547,259**	**46**	**527,913**	**44**	**78**	**115**
TEXAS											
Abilene	140.7	0.0615	2.82	46,840	44,919	20,685	46	18,080	40	94	97
Amarillo	176.3	0.0772	2.66	111,580	100,351	46,209	46	40,386	40	125	66
Austin	550.8	0.2410	2.70	275,681	247,079	109,806	44	105,485	43	129	76
Beaumont - Port Arthur - Orange	378.1	0.1655	2.82	150,684	139,545	67,576	48	52,753	38	96	85
Brownsville - Harlingen - San Benito	215.3	0.0942	3.56	62,313	56,862	26,186	46	22,887	40	79	88
Bryan - College Station	96.2	0.0421	2.83	38,988	36,427	16,775	46	14,661	40	184	69
Corpus Christi	329.5	0.1443	3.09	106,933	93,449	40,040	43	41,739	45	74	103
Dallas - Fort Worth	3,023.5	1.3232	2.74	1,444,918	1,355,850	602,124	44	523,014	39	146	85
El Paso	489.4	0.2142	3.38	168,024	139,246	57,093	41	62,617	45	99	89
Galveston - Texas City	198.3	0.0867	2.80	79,525	72,174	33,237	46	29,049	40	76	88
Houston	2,977.3	1.3030	2.80	1,408,738	1,291,750	596,471	46	530,972	41	108	89
Killeen - Temple	219.2	0.0959	3.20	57,879	54,689	25,186	46	22,012	40	105	89
Laredo	101.4	0.0444	3.81	30,337	27,750	12,779	46	11,169	40	68	81
Longview - Marshall	154.4	0.0676	2.79	61,109	58,157	26,786	46	23,410	40	83	79
Lubbock	214.3	0.0938	2.88	105,147	97,229	44,774	46	39,135	40	118	74
McAllen - Pharr - Edinburg	291.8	0.1277	3.70	64,736	56,269	31,421	56	16,983	30	57	89
Midland	84.2	0.0369	2.75	32,057	29,689	13,673	46	11,950	40	78	110
Odessa	117.5	0.0514	2.81	74,594	67,871	31,256	46	27,318	40	114	57
San Angelo	85.9	0.0376	2.76	37,330	33,233	15,303	46	13,376	40	95	78
San Antonio	1,086.7	0.4757	3.04	407,301	366,817	155,482	42	155,927	43	104	92
Sherman - Denison	90.3	0.0396	2.62	25,927	25,542	11,762	46	10,282	40	79	105
Texarkana	128.2	0.0561	2.76	37,774	35,871	17,151	48	14,290	40	70	98
Tyler	130.9	0.0573	2.76	49,160	47,850	22,035	46	19,259	40	90	87
Victoria	70.1	0.0307	2.96	32,080	27,464	13,520	49	11,916	43	99	74
Waco	172.8	0.0756	2.75	69,471	63,111	29,064	46	25,402	40	105	93
Wichita Falls	130.9	0.0572	2.77	50,748	46,400	21,368	46	18,676	40	96	84
Non-Metro Portion of State	2,873.1	1.2573	2.83	612,094	567,002	279,616	49	246,598	43	57	114
State Total	**14,474.8**	**6.3348**	**2.86**	**5,630,431**	**5,172,580**	**2,362,131**	**46**	**2,105,461**	**41**	**101**	**89**

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STATE Metro Name	12/31/80 Population (Thous.)	12/31/80 % Of U.S.	12/31/80 Average Household Size	1980 Eating & Drinking Place Sales ($000)	1980 Eating Place Sales ($000)	1980 Fast Food Sales ($000)	1980 Fast Food Market Share (%)	1980 Restaurant Sales ($000)	1980 Restaurant Market Share (%)	1980 RAI	1980 RGI
UTAH											
Provo - Orem	225.8	0.0988	3.73	32,381	30,943	13,606	44	15,861	51	65	191
Salt Lake City - Ogden	956.5	0.4188	3.12	211,070	197,601	91,319	46	96,239	49	77	154
Non-Metro Portion of State	314.8	0.1376	3.30	67,647	64,001	21,014	33	40,618	63	82	112
State Total	**1,497.1**	**0.6552**	**3.24**	**311,098**	**292,545**	**125,939**	**43**	**152,718**	**52**	**76**	**149**
VERMONT											
Burlington	116.7	0.0511	2.95	48,225	44,208	11,725	27	26,364	60	127	105
Non-Metro Portion of State	399.9	0.1750	2.80	117,221	108,082	28,678	27	64,476	60	87	135
State Total	**516.6**	**0.2261**	**2.83**	**165,446**	**152,290**	**40,403**	**27**	**90,840**	**60**	**96**	**126**
VIRGINIA											
Charlottesville	115.2	0.0503	2.79	36,547	36,343	17,506	48	14,544	40	83	98
Danville	112.2	0.0491	2.78	24,966	24,397	11,722	48	9,739	40	57	117
Lynchburg	154.6	0.0676	2.91	39,466	38,865	17,457	45	16,325	42	64	113
Newport News - Hampton	367.1	0.1607	2.90	155,510	152,386	57,091	37	74,246	49	124	81
Norfolk - Virginia Beach - Portsmouth	813.7	0.3562	3.00	287,791	273,362	144,393	53	104,627	38	105	91
Petersburg - Colonial Heights - Hopewell	129.7	0.0567	3.04	30,074	28,633	12,885	45	12,025	42	68	106
Richmond	638.4	0.2793	2.75	262,806	256,082	114,974	45	103,721	41	105	97
Roanoke	225.7	0.0990	2.66	85,568	83,483	37,492	45	35,033	42	90	97
Non-Metro Portion of State	1,642.3	0.7189	2.91	329,272	323,093	155,474	48	129,137	40	57	117
State Total	**5,399.0**	**2.3628**	**2.84**	**1,753,848**	**1,709,609**	**742,580**	**43**	**732,313**	**43**	**88**	**100**
WASHINGTON											
Bellingham	108.7	0.0476	2.66	63,184	61,528	19,793	32	38,982	63	191	55
Bremerton	150.3	0.0657	2.77	49,295	43,176	13,894	32	27,356	63	82	99
Olympia	128.2	0.0561	2.65	52,620	47,244	15,199	32	29,935	63	101	87
Richland - Kennewick - Pasco	149.1	0.0653	2.80	74,204	64,697	20,994	32	39,171	61	94	85
Seattle - Everett	1,621.6	0.7097	2.57	1,066,845	967,204	285,296	29	694,787	61	152	66
Spokane	346.6	0.1517	2.63	149,808	132,141	51,865	39	73,228	55	116	97
Tacoma	493.4	0.2159	2.75	178,876	153,377	55,931	36	87,940	57	111	92
Yakima	175.0	0.0766	2.79	67,409	58,340	18,933	32	35,320	61	103	86
Non-Metro Portion of State	821.9	0.3596	2.67	320,533	267,571	85,863	32	169,687	63	94	88
State Total	**4,192.3**	**1.8347**	**2.65**	**2,097,748**	**1,858,301**	**591,759**	**32**	**1,131,908**	**61**	**125**	**77**
WEST VIRGINIA											
Charleston	270.8	0.1185	2.68	94,822	89,726	42,635	48	36,925	41	87	102
Huntington - Ashland	313.3	0.1370	2.78	78,182	71,848	41,401	58	23,715	33	66	117
Parkersburg - Marietta	164.2	0.0719	2.79	52,068	47,091	21,530	46	20,475	43	73	103
Steubenville - Weirton	162.6	0.0711	2.80	44,345	35,194	15,830	45	15,619	44	63	135
Wheeling	185.8	0.0814	2.72	74,095	62,182	28,282	45	27,203	44	93	89
Non-Metro Portion of State	1,241.5	0.5435	2.87	214,554	196,342	95,774	49	78,954	40	47	146
State Total	**1,967.2**	**0.8610**	**2.82**	**452,467**	**412,584**	**203,008**	**49**	**164,236**	**40**	**60**	**125**
WISCONSIN											
Appleton - Oshkosh	292.8	0.1282	2.89	120,192	89,840	31,879	35	52,720	59	103	103
Duluth - Superior	267.2	0.1169	2.69	106,183	80,767	28,325	35	48,059	60	98	107
Eau Claire	131.9	0.0578	2.89	67,571	46,945	15,675	33	28,070	60	147	81
Green Bay	176.7	0.0773	2.88	81,567	62,338	20,812	33	37,272	60	115	95
Janesville - Beloit	140.0	0.0613	2.81	57,789	44,946	13,175	29	29,261	65	92	94
Kenosha	123.5	0.0541	2.83	47,952	33,738	11,263	33	20,173	60	102	115

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STATE Metro Name	12/31/80 Population (Thous.)	12/31/80 % Of U.S.	12/31/80 Average Household Size	1980 Eating & Drinking Place Sales ($000)	1980 Eating Place Sales ($000)	1980 Fast Food Sales ($000)	1980 Fast Food Market Share (%)	1980 Restaurant Sales ($000)	1980 Restaurant Market Share (%)	1980 RAI	1980 RGI
WISCONSIN *continued*											
La Crosse	91.9	0.0403	2.81	59,235	46,208	15,426	33	27,629	60	172	69
Madison	326.4	0.1428	2.64	197,917	160,483	62,744	39	88,601	55	175	83
Milwaukee	1,399.4	0.6125	2.76	692,562	551,692	188,049	34	316,978	57	110	98
Racine	173.5	0.0760	2.88	65,504	50,848	16,977	33	30,402	60	89	106
Sheboygan	101.7	0.0445	2.82	34,915	24,339	7,136	29	15,846	65	71	123
Wausau	112.5	0.0492	2.91	37,363	25,942	7,606	29	16,893	65	77	132
Non-Metro Portion of State	1,574.7	0.6888	2.86	627,998	420,972	123,495	29	274,326	65	97	102
State Total	**4,734.1**	**2.0718**	**2.81**	**2,122,100**	**1,576,414**	**520,755**	**33**	**948,920**	**60**	**108**	**98**
WYOMING											
Casper	73.6	0.0322	2.76	31,959	25,373	9,557	38	14,930	59	70	121
Non-Metro Portion of State	408.5	0.1788	2.82	140,811	110,825	41,808	38	65,312	59	79	149
State Total	**482.1**	**0.2110**	**2.81**	**172,770**	**136,198**	**51,365**	**38**	**80,242**	**59**	**77**	**144**
United States Total	**228 497.1**	**100.0000**	**2.79**	**87,309,502**	**77,676,523**	**30,054,452**	**39**	**38,992,772**	**50**	**100**	**100**

Sales by Area of Dominant Influence (ADI)

This ninth installment of the ADI Report shows 212 areas of dominant influence for a TV signal. Each area includes major cities and nearby counties.

ADI Name	12/31/80 Population (Thous.)	12/31/80 % Of U.S.	12/31/80 Average Household Size	1980 Eating & Drinking Place Sales ($000)	1980 Eating Place Sales ($000)	1980 Fast Food Sales ($000)	1980 Fast Food Market Share (%)	1980 Restaurant Sales ($000)	1980 Restaurant Market Share (%)	1980 RAI	1980 RGI
Abilene - Sweetwater	304.1	0.1332	2.72	87,518	83,979	39,798	47	35,099	42	78	103
Albany, Ga.	328.0	0.1435	3.01	62,457	60,197	32,721	54	21,855	36	61	126
Albany - Schenectady - Troy	1,276.1	0.5585	2.76	516,405	443,967	139,469	31	243,910	55	89	97
Albuquerque	1,014.2	0.4436	2.93	324,579	289,426	116,201	40	141,413	49	93	108
Alexandria, La.	250.4	0.1095	3.07	38,138	32,472	14,129	44	12,481	38	49	166
Alexandria, Minn.	226.1	0.0992	2.82	76,570	58,091	17,369	30	37,417	64	102	101
Alpena	42.3	0.0184	2.78	17,141	12,674	4,563	36	7,364	58	78	79
Amarillo	490.9	0.2148	2.74	193,125	176,542	82,147	47	74,724	42	95	84
Anchorage	222.5	0.0974	2.86	192,170	147,124	52,482	36	65,408	44	118	47
Anniston	117.8	0.0515	2.93	36,544	35,495	17,924	50	12,848	36	81	72
Ardmore - Ada	185.1	0.0811	2.67	39,377	37,276	17,802	48	15,380	41	58	115
Atlanta	3,002.6	1.3143	2.82	1,133,684	1,081,539	544,571	50	401,403	37	106	95
Augusta	557.5	0.2441	3.00	120,611	112,611	54,915	49	48,677	43	66	108
Austin, Tex.	602.1	0.2634	2.68	273,393	244,962	109,229	45	106,272	43	117	80
Bakersfield	409.4	0.1792	2.85	158,448	145,246	55,379	38	81,265	56	86	76

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ADI Name	12/31/80 Population (Thous.)	% Of U.S.	Average Household Size	1980 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Baltimore	2,433.3	1.0651	2.84	926,987	793,229	352,396	44	316,973	40	86	99
Bangor	340.5	0.1490	2.85	90,162	86,377	32,917	38	46,886	54	71	109
Baton Rouge	725.2	0.3176	3.06	182,200	159,261	78,342	49	62,029	39	68	126
Beaumont - Port Arthur	448.1	0.1961	2.81	160,182	148,678	72,220	49	56,729	38	86	89
Bend	65.1	0.0285	2.68	32,265	29,024	10,121	35	17,843	61	94	74
Billing - Hardin	207.3	0.0907	2.73	73,636	56,815	20,031	35	34,496	61	78	130
Biloxi - Gulfport - Pascagoula	169.1	0.0740	2.99	59,727	54,820	29,545	54	18,915	35	97	99
Binghamton	422.8	0.1851	2.82	128,228	105,731	35,954	34	58,159	55	73	108
Birmingham	1,335.8	0.5845	2.80	352,452	337,165	163,247	48	129,692	38	75	110
Bluefield - Beckley - Oak Hill	418.8	0.1834	2.88	76,007	71,274	34,726	49	28,539	40	43	146
Boise	392.0	0.1716	2.81	137,705	121,838	47,620	39	67,533	55	87	92
Boston	5,261.8	2.3028	2.79	2,313,259	2,116,691	622,174	29	1,172,560	55	114	97
Bowling Green	114.9	0.0503	2.84	33,988	30,829	16,391	53	12,503	41	65	100
Bristol - Kingsport - Johnson City	807.7	0.3533	2.85	163,480	158,509	85,360	54	53,949	34	61	113
Buffalo	1,724.2	0.7548	2.79	731,212	603,581	203,478	34	321,575	53	90	88
Burlington - Plattsburgh	601.8	0.2634	2.90	196,554	174,154	48,917	28	102,369	59	91	118
Casper - Riverton	149.0	0.0652	2.84	56,534	41,974	15,841	38	24,749	59	66	133
Cedar Rapids - Waterloo	883.8	0.3868	2.83	371,825	293,081	116,667	40	155,762	53	113	93
Charleston, S.C.	550.5	0.2411	3.10	153,312	144,872	72,291	50	52,250	36	89	95
Charleston - Huntington	1,491.3	0.6524	2.88	322,548	292,368	144,595	49	118,848	41	56	122
Charlotte	1,693.9	0.7411	2.83	456,877	440,189	220,693	50	178,168	40	80	108
Chattanooga	784.3	0.3435	2.84	190,405	181,643	88,524	49	79,566	44	68	115
Cheyenne	131.9	0.0577	2.69	45,385	39,757	14,811	37	23,066	58	91	121
Chicago	8,467.1	3.7056	2.84	3,781,552	3,352,254	1,241,406	37	1,719,484	51	131	98
Chico - Redding	339.6	0.1487	2.59	118,403	103,029	36,793	36	62,825	61	74	93
Cincinnati	1,973.0	0.8633	2.81	804,174	709,630	318,826	45	312,467	44	100	90
Clarksburg - Weston	211.1	0.0924	2.81	43,170	40,439	19,743	49	16,307	40	61	122
Cleveland	3,883.8	1.6997	2.77	1,592,215	1,385,978	548,632	40	701,946	51	98	95
Colorado Springs - Pueblo	552.6	0.2418	2.80	154,624	138,585	56,854	41	70,865	51	80	129
Columbia, S.C.	736.8	0.3227	3.07	192,363	183,362	90,528	49	71,271	39	81	109
Columbia - Jefferson City	345.3	0.1511	2.78	116,683	107,225	46,708	44	50,990	48	110	95
Columbus, Ga.	544.8	0.2386	2.97	130,442	123,711	66,054	53	45,199	37	80	103
Columbus - Tupelo	410.7	0.1798	2.96	73,210	69,200	38,017	55	25,600	37	51	127
Columbus, Ohio	1,592.4	0.6970	2.76	673,906	601,000	272,112	45	273,239	45	119	88
Corpus Christi	476.7	0.2086	3.10	145,139	128,603	57,181	44	57,030	44	68	99
Dallas - Ft. Worth	3,646.7	1.5959	2.72	1,573,343	1,477,518	661,009	45	575,070	39	129	88
Davenport - Rock Island - Moline	887.0	0.3883	2.76	376,821	300,910	128,726	43	147,039	49	114	93
Dayton	1,308.1	0.5726	2.77	492,883	442,732	202,106	46	197,576	45	106	93
Denver	2,284.8	1.0002	2.66	946,448	847,052	267,121	32	475,577	56	100	106
Des Moines	962.7	0.4213	2.68	388,144	323,988	132,908	41	161,686	50	99	103
Detroit	4,748.2	2.0780	2.86	2,133,145	1,856,861	695,393	37	928,624	50	113	89
Dothan	215.2	0.0941	2.90	41,163	40,454	22,278	55	14,434	36	60	113
Duluth - Superior	472.7	0.2071	2.72	180,480	135,201	44,749	33	82,933	61	95	109
El Centro - Yuma	186.6	0.0816	3.13	52,484	45,736	15,510	34	27,731	61	72	96
El Paso	609.7	0.2668	3.32	198,532	164,708	67,893	41	75,285	46	95	94
Elmira	237.7	0.1040	2.82	74,087	59,732	18,997	32	32,950	55	76	113
Erie	418.0	0.1829	2.85	126,047	100,831	43,066	43	48,984	49	100	129
Eugene	440.1	0.1926	2.66	204,474	176,900	70,279	40	95,425	54	109	78
Eureka	144.5	0.0633	2.57	63,093	54,689	19,469	36	33,379	61	87	89
Evansville	662.9	0.2904	2.75	212,152	181,533	87,636	48	74,823	41	89	110

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ADI Name	12/31/80 Population (Thous.)	% Of U.S.	Average Household Size	1980 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Fargo	590.1	0.2579	2.82	253,386	192,318	62,634	33	117,324	61	124	94
Farmington	83.4	0.0365	3.20	20,529	16,617	6,962	42	8,257	50	50	123
Flint - Saginaw - Bay City	1,281.8	0.5610	2.92	494,084	399,339	153,389	38	205,102	51	99	88
Florence, S.C.	305.2	0.1334	3.11	52,120	51,094	24,799	49	22,084	43	52	144
Ft. Myers - Naples	382.7	0.1676	2.46	158,518	145,983	55,117	38	79,196	54	82	89
Ft. Smith	332.3	0.1452	2.76	102,025	97,537	50,488	52	37,923	39	90	84
Ft. Wayne	619.6	0.2714	2.83	242,305	212,895	83,843	39	112,526	53	124	89
Fresno	1,062.5	0.4649	2.93	336,543	302,888	121,187	40	171,023	56	78	93
Gainesville	189.2	0.0828	2.74	79,026	74,440	26,990	36	40,079	54	106	64
Grand Junction	136.3	0.0597	2.74	40,796	38,326	10,570	28	24,925	65	81	99
Grand Rapids - Kalamazoo - Battle Creek	1,609.5	0.7040	2.87	606,305	518,529	180,944	35	293,488	57	140	87
Great Falls	180.3	0.0790	2.76	58,933	41,179	14,391	35	25,236	61	74	145
Green Bay	985.1	0.4310	2.86	408,333	295,768	96,820	33	181,581	61	105	96
Greensboro - Winston-Salem - High Point	1,232.6	0.5395	2.75	360,892	351,065	160,967	46	132,744	38	92	102
Greenville - New Bern - Washington	613.5	0.2686	3.03	133,532	125,545	65,994	53	51,643	41	72	100
Greenville - Spartanburg - Asheville	1,534.9	0.6713	2.81	399,965	384,247	196,865	51	151,707	39	73	105
Greenwood - Greenville	220.2	0.0964	3.23	31,656	30,503	16,691	55	11,221	37	41	141
Harrisburg - York - Lancaster - Lebanon	1,260.1	0.5514	2.79	437,746	376,339	158,513	42	184,695	49	84	113
Harrisonburg	133.9	0.0585	2.91	28,907	27,253	13,123	48	10,896	40	58	121
Hartford - New Haven	2,209.0	0.9668	2.80	828,206	752,070	264,014	35	357,201	47	106	111
Helena	43.9	0.0193	2.64	19,576	14,447	4,959	34	8,849	61	80	122
Houston	3,488.5	1.5266	2.80	1,580,564	1,446,145	670,224	46	595,443	41	103	89
Huntsville - Decatur - Florence	677.4	0.2965	2.85	156,842	151,943	77,850	51	56,331	37	72	111
Idaho Falls - Pocatello	287.7	0.1257	3.13	67,265	57,757	22,892	40	32,070	56	61	145
Indianapolis	2,219.3	0.9710	2.78	800,082	720,845	344,771	48	286,837	40	112	97
Jackson, Miss.	808.3	0.3537	2.99	181,199	174,161	87,464	50	54,777	31	64	120
Jackson, Tenn.	119.6	0.0523	2.76	30,767	28,742	13,469	47	13,273	46	64	108
Jacksonville	1,017.6	0.4453	2.80	333,829	312,420	157,065	50	127,660	41	85	108
Johnstown - Altoona	799.1	0.3496	2.86	224,688	188,180	78,547	42	90,413	48	73	117
Jonesboro	179.5	0.0786	2.72	36,185	35,018	17,320	49	14,398	41	63	117
Joplin - Pittsburg	442.7	0.1936	2.61	138,727	131,163	60,965	46	60,687	46	103	88
Kansas City	1,869.4	0.8184	2.69	791,355	733,823	334,567	46	313,379	43	131	92
Knoxville	1,096.7	0.4797	2.81	268,587	256,457	128,565	50	106,027	41	69	118
La Crosse - Eau Claire	445.9	0.1953	2.85	196,350	137,368	44,138	32	84,400	61	123	91
Lafayette, Ind.	122.2	0.0534	2.95	53,672	48,907	22,898	47	20,832	43	150	81
Lafayette, La.	535.8	0.2347	3.03	120,352	103,049	44,164	43	37,065	36	63	122
Lake Charles	208.5	0.0913	2.95	58,525	51,992	22,765	44	20,394	39	63	112
Lansing	614.6	0.2690	2.89	235,486	200,774	85,616	43	95,896	48	137	91
Laredo	108.2	0.0474	3.77	31,553	28,966	13,393	46	11,710	40	69	80
Las Vegas	488.9	0.2140	2.63	205,459	169,714	60,427	36	98,967	58	94	534
Laurel - Hattiesburg	241.8	0.1056	2.93	60,059	57,455	31,475	55	21,181	37	75	90
Lexington	816.6	0.3578	2.88	232,449	223,931	117,357	52	85,947	38	73	94
Lima	112.4	0.0491	2.84	47,835	43,943	18,833	43	20,693	47	123	82
Lincoln - Hastings - Kearney	661.9	0.2896	2.67	280,829	222,610	86,388	39	121,931	55	121	95
Little Rock	1,219.4	0.5340	2.78	284,145	272,278	137,066	50	109,197	40	76	123
Los Angeles	10,957.6	4.7956	2.76	5,087,728	4,744,575	1,704,299	36	2,696,865	57	118	86
Louisville	1,475.2	0.6458	2.84	511,285	461,140	233,083	51	178,515	39	90	98
Lubbock	402.2	0.1761	2.92	141,513	132,782	62,331	47	54,702	41	92	85

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ADI Name	12/31/80 Population (Thous.)	% Of U.S.	Average Household Size	1980 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
Macon	423.4	0.1851	2.94	105,948	101,228	53,281	53	37,579	37	73	104
Madison	510.9	0.2234	2.69	275,942	213,283	78,254	37	123,049	58	146	85
Mankato	104.3	0.0454	2.77	47,873	38,035	11,733	31	24,044	63	104	85
Marquette	151.4	0.0662	2.88	58,003	40,846	14,615	36	23,881	58	86	90
McAllen - Brownsville	552.8	0.2419	3.66	131,521	117,151	59,584	51	41,611	36	64	91
Medford	312.5	0.1368	2.67	127,642	110,729	38,688	35	68,018	61	90	79
Memphis	1,667.0	0.7296	2.93	371,979	348,318	162,444	47	144,866	42	63	133
Meridian	158.8	0.0695	2.92	33,686	32,387	17,781	55	11,836	37	57	116
Miami	2,826.0	1.2368	2.58	1,417,974	1,312,637	390,292	30	775,146	59	117	93
Miles City - Glendive	30.6	0.0132	2.71	12,153	8,891	3,091	35	5,479	62	84	132
Milwaukee	1,888.8	0.8268	2.79	885,503	395,970	232,427	33	408,201	59	106	100
Minneapolis - St. Paul	3,028.1	1.3252	2.79	1,300,637	1,089,086	375,841	35	635,807	58	129	102
Minot - Bismarck - Dickinson	377.5	0.1656	2.88	141,517	96,990	30,835	32	59,876	62	94	119
Missoula - Butte	308.6	0.1349	2.73	109,545	79,167	27,429	35	48,352	61	84	126
Mobile - Pensacola	1,120.2	0.4899	2.94	309,384	282,047	137,731	49	111,115	39	78	107
Monroe - El Dorado	524.3	0.2294	2.91	84,972	77,098	34,103	44	28,968	38	53	153
Montgomery	481.5	0.2111	2.92	118,524	114,064	56,683	50	38,515	34	79	114
Nashville	1,819.7	0.7967	2.82	496,531	472,484	201,108	43	225,115	48	77	111
New Orleans	1,682.5	0.7362	2.89	602,893	524,726	211,772	40	226,197	43	85	115
New York	18,033.2	7.8919	2.76	6,980,744	6,147,573	1,823,588	30	3,347,844	54	99	115
Norfolk - Portsmouth - Newport News - Hampton	1,426.1	0.6243	2.95	498,704	479,537	228,960	48	200,814	42	101	89
North Platte	42.1	0.0183	2.72	19,648	17,272	6,443	37	9,730	56	125	82
Odessa - Midland	342.9	0.1500	2.85	149,606	136,763	64,410	47	56,364	41	90	80
Oklahoma City	1,406.0	0.6154	2.66	540,751	510,426	249,809	49	193,781	38	100	88
Omaha	920.8	0.4032	2.75	399,999	318,897	124,452	39	169,545	53	118	101
Orlando - Daytona Beach	1,531.3	0.6700	2.64	682,483	633,459	253,679	40	319,845	50	103	99
Ottumwa - Kirksville	82.4	0.0361	2.68	19,912	16,572	7,211	44	8,497	51	74	120
Paducah - Cape Girardeau - Harrisburg	862.1	0.3771	2.68	233,485	208,944	97,830	47	96,530	46	75	103
Palm Springs	681.5	0.2982	2.71	280,274	262,391	90,797	35	152,794	58	106	83
Panama City	222.5	0.0974	2.79	72,405	66,430	24,717	37	36,055	54	89	86
Parkersburg	94.3	0.0413	2.74	30,709	28,582	13,577	48	11,762	41	76	104
Peoria	606.0	0.2650	2.77	257,171	215,482	94,994	44	101,112	47	110	99
Philadelphia	6,810.9	2.9807	2.83	2,643,635	2,219,472	793,455	36	1,140,562	51	98	117
Phoenix	1,976.5	0.8649	2.79	652,794	594,599	204,033	34	305,607	51	88	112
Pittsburgh	3,403.6	1.4894	2.75	1,105,422	897,186	319,291	36	463,359	52	82	121
Portland, Ore.	2,087.6	0.9138	2.62	1,082,964	937,536	329,739	35	546,866	58	147	77
Portland - Poland Spring	883.5	0.3866	2.75	313,079	298,781	110,846	37	164,916	55	93	99
Presque Isle	91.1	0.0399	3.07	18,666	17,237	6,570	38	9,353	54	63	125
Providence - New Bedford	1,528.9	0.6691	2.78	513,874	455,838	154,645	34	246,789	54	96	104
Quincy - Hannibal	349.9	0.1531	2.70	98,717	77,949	34,580	44	37,842	49	81	122
Raleigh - Durham	1,574.9	0.6895	2.90	421,507	406,779	194,785	48	168,021	41	86	107
Rapid City	252.2	0.1105	2.88	124,218	100,925	31,877	32	63,068	62	115	77
Reno	330.8	0.1446	2.56	132,512	115,480	41,269	36	67,777	59	109	352
Richmond	1,205.0	0.5272	2.82	392,453	382,294	174,831	46	154,769	40	88	101
Roanoke - Lynchburg	996.6	0.4366	2.83	247,560	243,163	113,051	46	99,638	41	67	111
Rochester, N.Y.	933.5	0.4085	2.80	375,645	329,259	104,037	32	178,770	54	92	99
Rochester - Mason City - Austin	375.0	0.1640	2.71	140,716	118,429	41,920	35	69,524	59	110	118
Rockford	516.3	0.2259	2.78	200,138	169,368	58,699	35	97,379	57	104	97
Roswell	156.2	0.0685	2.85	40,784	36,184	15,231	42	17,800	49	69	130
Sacramento - Stockton	2,261.3	0.9897	2.68	976,645	882,645	336,243	38	492,873	56	101	79

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ADI Name	12/31/80 Population (Thous.)	% Of U.S.	Average Household Size	1980 Eating & Drinking Place Sales ($000)	Eating Place Sales ($000)	Fast Food Sales ($000)	Fast Food Market Share (%)	Restaurant Sales ($000)	Restaurant Market Share (%)	RAI	RGI
St. Joseph	127.9	0.0559	2.66	46,461	40,532	17,510	43	18,641	46	100	97
St. Louis	2,862.2	1.2525	2.78	1,145,930	1,007,143	450,771	45	434,336	43	105	99
Salinas - Monterey	513.9	0.2248	2.85	234,391	216,200	66,854	31	137,658	64	118	80
Salisbury	215.3	0.0942	2.74	104,391	94,900	38,755	41	47,066	50	90	73
Salt Lake City	1,628.3	0.7126	3.21	354,076	328,179	139,395	42	173,622	53	76	155
San Angelo	95.5	0.0419	2.76	41,111	35,397	16,407	46	14,358	41	92	79
San Antonio	1,486.5	0.6508	3.04	493,768	444,229	193,695	44	187,879	42	93	95
San Diego	1,904.9	0.8337	2.75	824,693	749,660	296,786	40	419,536	56	124	90
San Francisco	5,095.1	2.2298	2.59	2,680,658	2,424,802	803,830	33	1,412,325	58	120	91
Santa Barbara - Santa Maria San Luis Obispo	461.0	0.2017	2.68	265,992	250,450	76,786	31	163,479	65	150	68
Sarasota	208.3	0.0912	2.26	133,771	125,844	34,111	27	77,151	61	131	63
Savannah	574.1	0.2509	3.01	158,879	145,347	76,201	52	55,094	38	83	112
Seattle - Tacoma	2,862.9	1.2529	2.62	1,572,357	1,411,039	434,638	31	866,765	61	135	71
Selma	78.8	0.0345	3.04	11,659	11,234	6,181	55	4,000	36	40	147
Shreveport - Texarkana	1,198.3	0.5245	2.79	295,478	276,386	130,017	47	108,190	39	72	111
Sioux City	421.5	0.1844	2.76	164,602	125,517	49,669	40	67,708	54	97	101
Sioux Falls - Mitchell	580.7	0.2538	2.76	230,822	183,826	56,685	31	115,947	63	114	96
South Bend - Elkhart	782.0	0.3422	2.82	300,108	255,597	103,113	40	128,218	50	110	92
Spokane	873.9	0.3823	2.70	313,967	258,740	96,296	37	149,447	58	89	103
Springfield, Mass.	646.7	0.2830	2.82	229,523	197,527	62,013	31	98,689	50	74	111
Springfield, Mo.	746.4	0.3268	2.70	214,861	199,809	92,251	46	88,705	44	95	93
Springfield - Decatur - Champaign	853.1	0.3735	2.70	366,866	307,801	126,548	41	150,069	49	109	95
Syracuse	932.5	0.4081	2.86	368,284	318,079	97,530	31	169,462	53	83	97
Tallahassee	448.1	0.1962	2.90	125,600	119,743	52,170	44	56,886	48	76	94
Tampa - St. Petersburg	2,277.1	0.9964	2.49	914,596	840,025	322,915	38	419,220	50	85	88
Terre Haute	437.9	0.1916	2.69	119,539	100,168	45,949	46	44,385	44	85	112
Toledo	1,134.0	0.4963	2.83	462,831	403,437	161,249	40	199,008	49	105	87
Topeka	383.6	0.1678	2.74	150,561	132,419	64,066	48	57,991	44	125	92
Traverse City - Cadillac	403.5	0.1768	2.78	185,537	142,168	51,234	36	83,094	58	99	86
Tucson	691.4	0.3026	2.76	175,600	156,279	59,782	38	79,426	51	70	136
Tulsa	1,112.1	0.4867	2.66	350,084	332,230	155,915	47	131,610	40	83	103
Tuscaloosa	139.3	0.0609	2.90	40,722	39,290	19,841	50	14,222	36	99	89
Twin Falls	82.7	0.0364	2.77	25,333	22,833	9,068	40	12,642	55	95	139
Tyler	257.5	0.1126	2.83	70,316	68,533	32,094	47	28,241	41	69	104
Utica	377.9	0.1655	2.85	151,984	126,658	47,075	37	60,978	48	88	84
Victoria	70.1	0.0307	2.96	32,080	27,464	13,520	49	11,916	43	99	74
Waco - Temple	599.3	0.2622	2.90	185,831	172,433	80,173	46	69,986	41	105	90
Washington, D.C.	4,015.7	1.7569	2.76	1,695,954	1,614,705	615,527	38	738,844	46	112	105
Watertown - Carthage	227.5	0.0995	3.01	72,970	56,281	17,988	32	31,978	57	71	106
Wausau - Rhinelander	430.6	0.1883	2.88	160,593	110,015	32,264	29	71,662	65	84	115
West Palm Beach	835.0	0.3656	2.47	369,570	331,989	100,364	30	207,740	63	89	92
Wheeling - Steubenville	465.4	0.2038	2.79	145,177	116,956	52,145	45	52,543	45	75	108
Wichita - Hutchinson	1,077.3	0.4717	2.64	464,958	429,700	209,480	49	182,339	42	124	85
Wichita Falls - Lawton	439.8	0.1925	2.79	118,393	109,936	52,119	47	44,657	41	75	101
Wilkes-Barre - Scranton	1,296.5	0.5676	2.76	325,811	268,247	106,291	40	132,473	49	68	132
Wilmington	452.7	0.1981	2.91	153,426	146,984	72,364	49	61,565	42	103	99
Yakima	464.7	0.2033	2.78	204,802	174,450	57,010	33	106,624	61	100	84
Youngstown	659.0	0.2883	2.82	232,114	195,814	85,480	44	92,554	47	86	102
Zanesville	83.8	0.0367	2.80	24,024	19,000	8,169	43	8,965	47	70	125
Total ADIs	227,330.3	99.4894	2.79	86,455,481	76,926,426	29,816,301	39	38,611,839	50	100	100

Top 100 Restaurant Markets - 1980

By metro area

Metro Area Name	Sales ($000)	Ranking
Los Angeles - Long Beach	1,873,504	1
New York	1,823,258	2
Chicago	1,500,696	3
San Francisco - Oakland	988,113	4
Detroit	852,109	5
Boston - Lowell - Brockton - Lawrence - Haverhill	817,049	6
Philadelphia	747,064	7
Washington	633,912	8
Seattle - Everett	594,787	9
Anaheim - Santa Ana - Garden Grove	590,618	10
Houston	530,972	11
Dallas - Fort Worth	523,014	12
Minneapolis - St. Paul	495,467	13
Nassau - Suffolk	478,300	14
San Diego	419,536	15
Miami	387,548	16
St. Louis	381,352	17
Cleveland	376,176	18
Fort Lauderdale - Hollywood	366,048	19
Pittsburgh	357,139	20
Portland, Ore.	352,327	21
Denver - Boulder	337,801	22
Atlanta	326,125	23
Newark, N.J.	320,196	24
Milwaukee	316,978	25
Tampa - St. Petersburg	316,258	26
San Jose	308,998	27
Riverside - San Bernardino - Ontario	282,405	28
Baltimore	277,832	29
Cincinnati	265,128	30
Kansas City	261,169	31
Honolulu	256,503	32
Sacramento	250,119	33
Phoenix	249,614	34
Buffalo	249,475	35
Columbus, Ohio	214,467	36
New Orleans	188,823	37
Rochester, N.Y.	181,354	38
Hartford - New Britain - Bristol	172,029	[illegible]
West Palm Beach - Boca Raton	164,710	[illegible]
Albany - Schenectady - Troy	163,379	41
San Antonio	155,927	42
Indianapolis	155,502	43
Nashville-Davidson	153,830	44
Orlando	152,921	45
Bridgeport - Stamford - Norwalk - Danbury	149,934	46
Toledo	149,563	47
Grand Rapids	141,301	48
Providence - Warwick - Pawtucket	135,331	49
Dayton	135,069	50
Oklahoma City	134,570	51
Akron	133,949	52
Louisville	133,736	53
New Haven - West Haven - Waterbury - Meriden	130,721	54
Syracuse	124,563	55
Omaha	123,292	56
Santa Barbara - Santa Maria - Lompoc	115,829	57
Long Branch - Asbury Park	108,474	58
Gary - Hammond - East Chicago	107,501	59
Memphis	105,738	60
Austin	105,485	61
Norfolk - Virginia Beach - Portsmouth	104,627	62
Birmingham	103,768	63
Richmond	103,721	64
Greensboro - Winston-Salem - High Point	101,342	65
Jacksonville, Fla.	100,108	66
Las Vegas	96,581	67
Oxnard - Simi Valley - Ventura	96,286	68
Salt Lake City - Ogden	96,239	69
Portsmouth - Dover - Rochester	95,993	70
Fresno	92,075	71
Worcester - Fitchburg - Leominster	91,774	72
Allentown - Bethlehem - Easton	89,056	73
Springfield - Chicopee - Holyoke	88,718	74
Madison	88,601	75
Fort Wayne	88,457	76
Tacoma	87,940	77
Tulsa	87,158	78
Northeast Pennsylvania	86,586	79
Salinas - Seaside - Monterey	85,705	80
Charlotte - Gastonia	84,377	81
Wichita	83,148	82
Raleigh - Durham	82,315	83
Flint	81,732	84
Bakersfield	81,265	85
Sarasota	77,151	86
Harrisburg	76,903	87
Davenport - Rock Island - Moline	76,054	88
New Brunswick - Perth Amboy - Sayreville	75,770	89
Wilmington, Del.	75,727	90
Youngstown - Warren	75,448	91
Lansing - East Lansing	74,750	92
Paterson - Clifton - Passaic	74,737	93
New Bedford - Fall River	74,526	94
Canton	74,316	95
Newport News - Hampton	74,246	96
Spokane	73,228	97
Daytona Beach	71,397	98
Greenville - Spartanburg	71,232	99
Vallejo - Fairfield - Napa	70,919	100

By ADI

ADI Name	Sales ($000)	Ranking
New York	3,347,844	1
Los Angeles	2,696,865	2
Chicago	1,719,484	3
San Francisco	1,412,325	4
Boston	1,172,560	5
Philadelphia	1,140,562	6
Detroit	928,624	7
Seattle - Tacoma	866,765	8
Miami	775,146	9
Washington, D.C.	738,844	10
Cleveland	701,946	11
Minneapolis - St. Paul	635,807	12
Houston	595,443	13
Dallas - Ft. Worth	575,070	14
Portland, Ore.	546,866	15
Sacramento - Stockton	492,873	16
Denver	475,577	17
Pittsburgh	463,359	18
St. Louis	434,336	19
San Diego	419,536	20
Tampa - St. Petersburg	419,220	21
Milwaukee	408,201	22
Atlanta	401,403	23
Hartford - New Haven	357,201	24
Buffalo	321,575	25
Orlando - Daytona Beach	319,845	26
Baltimore	316,973	27
Kansas City	313,379	28
Cincinnati	312,467	29
Phoenix	305,607	30
Grand Rapids - Kalamazoo - Battle Creek	293,488	31
Indianapolis	286,837	32
Columbus, Ohio	273,239	33
Providence - New Bedford	246,789	34
Albany - Schenectady - Troy	243,910	35
New Orleans	226,197	36
Nashville	225,115	37
West Palm Beach	207,740	38
Flint - Saginaw - Bay City	205,102	39
Norfolk - Portsmouth - Newport News - Hampton	200,814	40
Toledo	199,008	41
Dayton	197,576	42
Oklahoma City	193,781	43
San Antonio	187,879	44
Harrisburg - York - Lancaster - Lebanon	184,695	45
Wichita - Hutchinson	182,339	46
Green Bay	181,581	47
Rochester, N.Y.	178,770	48
Louisville	178,515	49
Charlotte	178,168	50
Salt Lake City	173,622	51
Fresno	171,023	52
Omaha	169,545	53
Syracuse	169,462	54
Raleigh - Durham	168,021	55
Portland - Poland Spring	164,916	56
Santa Barbara - Santa Maria - San Luis Obispo	163,479	57
Des Moines	161,686	58
Cedar Rapids - Waterloo	155,762	59
Richmond	154,769	60
Palm Springs	152,794	61
Greenville - Spartanburg - Asheville	151,707	62
Springfield - Decatur - Champaign	150,069	63
Spokane	149,447	64
Davenport - Rock Island - Moline	147,039	65
Memphis	144,866	66
Albuquerque	141,413	67
Salinas - Monterey	137,658	68
Greensboro - Winston-Salem - High Point	132,744	69
Wilkes-Barre - Scranton	132,473	70
Tulsa	131,610	71
Birmingham	129,692	72
South Bend - Elkhart	128,218	73
Jacksonville	127,660	74
Madison	123,049	75
Lincoln - Hastings - Kearney	121,931	76
Charleston - Huntington	118,848	77
Fargo	117,324	78
Sioux Falls - Mitchell	115,947	79
Ft. Wayne	112,526	80
Mobile - Pensacola	111,115	81
Little Rock	109,197	82
Shreveport - Texarkana	108,190	83
Yakima	106,624	84
Austin, Tex.	106,272	85
Knoxville	106,027	86
Burlington - Plattsburgh	102,369	87
Peoria	101,112	88
Roanoke - Lynchburg	99,638	89
Las Vegas	98,967	90
Springfield, Mass.	98,689	91
Rockford	97,379	92
Paducah - Cape Girardeau - Harrisburg	96,530	93
Lansing	95,896	94
Eugene	95,425	95
Youngstown	92,554	96
Johnstown - Altoona	90,413	97
Springfield, Mo.	88,705	98
Lexington	85,947	99
La Crosse - Eau Claire	84,400	100

Top 100 Fast Food Markets-1980

By metro area

Metro Area Name	Sales Ranking ($000)	
Los Angeles - Long Beach	1,122,694	1
Chicago	1,040,410	2
New York	932,002	3
Detroit	640,105	4
Dallas - Fort Worth	602,124	5
Houston	596,471	6
Philadelphia	522,162	7
San Francisco - Oakland	516,926	8
Washington	510,729	9
Boston - Lowell - Brockton - Lawrence - Haverhill	439,225	10
Atlanta	420,877	11
St. Louis	400,540	12
Anaheim - Santa Ana - Garden Grove	359,046	13
Baltimore	325,592	14
Minneapolis - St. Paul	308,579	15
San Diego	296,786	16
Nassau - Suffolk	268,479	17
Seattle - Everett	285,296	18
Kansas City	283,527	19
Cleveland	268,246	20
Cincinnati	249,852	21
Riverside - San Bernardino - Ontario	237,058	22
Tampa - St. Petersburg	235,773	23
Pittsburgh	229,362	24
San Jose	220,881	25
Columbus, Ohio	218,436	26
Portland, Ore.	217,501	27
Indianapolis	208,246	28
Miami	207,593	29
Denver - Boulder	197,852	30
Milwaukee	188,049	31
Newark, N.J.	185,243	32
Oklahoma City	182,344	33
Louisville	180,866	34
Honolulu	176,745	35
Phoenix	174,465	36
Sacramento	169,163	37
Fort Lauderdale - Hollywood	166,851	38
New Orleans	163,133	39
Buffalo	162,040	40
San Antonio	155,482	41
Dayton	144,462	42
Norfolk - Virginia Beach - Portsmouth	144,393	43
Orlando	135,667	44
Hartford - New Britain - Bristol	135,463	45
Birmingham	124,535	46
Jacksonville, Fla.	123,423	47
Nashville-Davidson	123,352	48
Greensboro - Winston-Salem - High Point	121,621	49
Toledo	117,156	50
Richmond	114,974	51
Memphis	114,883	52
Wichita	111,285	53
Austin	109,806	54
Akron	109,015	55
Tulsa	106,093	56
Rochester, N.Y.	105,605	57
Gary - Hammond - East Chicago	104,891	58
Charlotte - Gastonia	104,450	59
Greenville - Spartanburg	98,582	60
New Haven - West Haven - Waterbury - Meriden	94,678	61
Albany - Schenectady - Troy	92,270	62
Omaha	91,503	63
Salt Lake City - Ogden	91,319	64
Raleigh - Durham	86,767	65
Allentown - Bethlehem - Easton	77,748	66
Fresno	74,955	67
New Brunswick - Perth Amboy - Sayreville	74,341	68
Providence - Warwick - Pawtucket	73,062	69
Youngstown - Warren	72,597	70
Syracuse	72,354	71
Oxnard - Simi Valley - Ventura	72,289	72
Grand Rapids	71,678	73
Lansing - East Lansing	71,448	74
Bridgeport - Stamford - Norwalk - Danbury	70,900	75
Harrisburg	69,910	76
Knoxville	69,281	77
Flint	68,856	78
West Palm Beach - Boca Raton	68,686	79
Beaumont - Port Arthur - Orange	67,576	80
Davenport - Rock Island - Moline	67,223	81
Lexington-Fayette	65,969	82
Columbia, S.C.	64,214	83
Baton Rouge	63,661	84
Wilmington, Del.	63,516	85
Des Moines	63,403	86
Peoria	63,328	87
Albuquerque	62,792	88
Madison	62,744	89
Northeast Pennsylvania	62,281	90
Little Rock - North Little Rock	62,079	91
Charleston - North Charleston, S.C.	61,855	92
New Bedford - Fall River	61,394	93
Fort Wayne	60,801	94
Canton	60,751	95
Long Branch - Asbury Park	59,618	96
Portsmouth - Dover - Rochester	59,304	97
Johnson City - Kingsport - Bristol	59,083	98
Las Vegas	58,911	99
Mobile	58,198	100

By ADI

ADI Name	Sales Ranking ($000)	
New York	1,823,588	1
Los Angeles	1,704,299	2
Chicago	1,241,406	3
San Francisco	803,830	4
Philadelphia	793,455	5
Detroit	695,393	6
Houston	670,224	7
Dallas - Ft. Worth	661,009	8
Boston	622,174	9
Washington, D.C.	615,527	10
Cleveland	548,632	11
Atlanta	544,571	12
St. Louis	450,771	13
Seattle - Tacoma	434,638	14
Miami	390,292	15
Minneapolis - St. Paul	375,841	16
Baltimore	352,396	17
Indianapolis	344,771	18
Sacramento - Stockton	336,243	19
Kansas City	334,567	20
Portland, Ore.	329,739	21
Tampa - St. Petersburg	322,915	22
Pittsburgh	319,291	23
Cincinnati	318,826	24
San Diego	296,786	25
Columbus, Ohio	272,112	26
Denver	267,121	27
Hartford - New Haven	264,014	28
Orlando - Daytona Beach	253,679	29
Oklahoma City	249,809	30
Louisville	233,083	31
Milwaukee	232,427	32
Norfolk - Portsmouth - Newport News - Hampton	228,960	33
Charlotte	220,693	34
New Orleans	211,772	35
Wichita - Hutchinson	209,480	36
Phoenix	204,033	37
Buffalo	203,478	38
Dayton	202,106	39
Nashville	201,108	40
Greenville - Spartanburg - Asheville	196,865	41
Raleigh - Durham	194,785	42
San Antonio	193,695	43
Grand Rapids - Kalamazoo - Battle Creek	180,944	44
Richmond	174,831	45
Birmingham	163,247	46
Memphis	162,444	47
Toledo	161,249	48
Greensboro - Winston-Salem - High Point	160,967	49
Harrisburg - York - Lancaster - Lebanon	158,513	50
Jacksonville	157,065	51
Tulsa	155,915	52
Providence - New Bedford	154,645	53
Flint - Saginaw - Bay City	153,389	54
Charleston - Huntington	144,595	55
Albany - Schenectady - Troy	139,469	56
Salt Lake City	139,395	57
Mobile - Pensacola	137,731	58
Little Rock	137,066	59
Des Moines	132,908	60
Shreveport - Texarkana	130,017	61
Davenport - Rock Island - Moline	128,726	62
Knoxville	128,565	63
Springfield - Decatur - Champaign	126,548	64
Omaha	124,452	65
Fresno	121,187	66
Lexington	117,357	67
Cedar Rapids - Waterloo	116,667	68
Albuquerque	116,201	69
Roanoke - Lynchburg	113,051	70
Portland - Poland Spring	110,846	71
Austin, Tex.	109,229	72
Wilkes-Barre - Scranton	106,291	73
Rochester, N.Y.	104,037	74
South Bend - Elkhart	103,113	75
West Palm Beach	100,364	76
Paducah - Cape Girardeau - Harrisburg	97,830	77
Syracuse	97,530	78
Green Bay	96,820	79
Spokane	96,296	80
Peoria	94,994	81
Springfield, Mo.	92,251	82
Palm Springs	90,797	83
Columbia, S.C.	90,528	84
Chattanooga	88,524	85
Evansville	87,636	86
Jackson, Miss.	87,464	87
Lincoln - Hastings - Kearney	86,388	88
Lansing	85,616	89
Youngstown	85,480	90
Bristol - Kingsport - Johnson City	85,360	91
Ft. Wayne	83,843	92
Amarillo	82,147	93
Waco - Temple	80,173	94
Johnstown - Altoona	78,547	95
Baton Rouge	78,342	96
Madison	78,254	97
Huntsville - Decatur - Florence	77,850	98
Santa Barbara - Santa Maria - San Luis Obispo	76,786	99
Savannah	76,201	100

Top 100 RAI Markets-1980

By metro area

Metro Area Name	RAI	Ranking
Ann Arbor	226	1
Honolulu	211	2
Bellingham	191	3
Grand Rapids	188	4
Bryan - College Station	184	5
Madison	175	6
Columbia, Mo.	173	7
La Crosse	172	8
Wichita	170	9
Fargo - Moorhead	165	10
Sioux Falls	165	10
Portland, Ore.	163	12
Champaign - Urbana - Rantoul	162	13
Santa Barbara - Santa Maria - Lompoc	162	13
Panama City	158	15
Lincoln	153	16
Seattle - Everett	152	17
Salem	151	18
Lafayette - West Lafayette	150	19
Fort Wayne	146	20
Eau Claire	147	21
Dallas - Fort Worth	146	22
Kansas City	146	22
Battle Creek	143	24
Grand Forks	141	25
St. Cloud	141	25
Kalamazoo - Portage	140	27
Springfield, Mo.	140	27
Iowa City	139	29
Jackson, Mich.	137	30
Minneapolis - St. Paul	137	30
Chicago	136	32
Omaha	136	32
Jacksonville, N.C.	135	34
Kankakee	135	34
Salinas - Seaside - Monterey	135	34
Daytona Beach	134	37
Rochester, Minn.	134	37
Saginaw	134	37
South Bend	134	37
Bloomington - Normal	133	41
Anchorage	132	42
Columbus, Ohio	131	43
Lawrence, Kans.	131	43
Sarasota	131	43
Anaheim - Santa Ana - Garden Grove	129	46
Austin	129	46
Bloomington, Ind.	129	46
Davenport - Rock Island - Moline	129	46
Lansing - East Lansing	129	46
San Francisco - Oakland	128	51
Burlington, Vt.	127	52
Amarillo	125	53
Fort Lauderdale - Hollywood	125	53
Evansville	124	55
Newport News - Hampton	124	55
San Diego	124	55
Fort Walton Beach	123	58
Atlanta	122	59
Boston - Lowell - Brockton - Lawrence - Haverhill	122	59
Cedar Rapids	122	59
Dubuque	122	59
Gainesville	122	59
Bismarck	121	64
Washington	121	64
Kokomo	119	66
Muncie	119	66
Muskegon - Norton Shores - Muskegon Heights	119	66
Indianapolis	118	69
Los Angeles - Long Beach	118	69
Lubbock	118	69
Atlantic City	117	72
Rockford	117	72
San Jose	117	72
Elkhart	116	75
Oklahoma City	116	75
Spokane	116	75
Dayton	115	78
Green Bay	115	78
Joplin	115	78
Reno	115	78
Topeka	115	78
Boise	114	83
Enid	114	83
Montgomery	114	83
New York	114	83
Odessa	114	83
Terre Haute	114	83
Eugene - Springfield	113	89
Athens	112	90
Cincinnati	112	90
Hartford - New Britain - Bristol	112	90
Peoria	112	90
Albuquerque	111	94
Des Moines	111	94
Melbourne - Titusville - Cocoa	111	94
Tacoma	111	94
Anderson, Ind.	110	98
Miami	110	98
Milwaukee	110	98
Paterson - Clifton - Passaic	110	98
St. Joseph	110	98
St. Louis	110	98
Toledo	110	98
Waterloo - Cedar Falls	110	98

By ADI

ADI Name	RAI	Ranking
Lafayette, Ind.	150	1
Santa Barbara - Santa Maria - San Luis Obispo	150	1
Portland, Ore.	147	3
Madison	146	4
Grand Rapids - Kalamazoo - Battle Creek	140	5
Lansing	137	6
Seattle - Tacoma	135	7
Chicago	131	8
Kansas City	131	8
Sarasota	131	8
Dallas - Ft. Worth	129	11
Minneapolis - St. Paul	129	11
North Platte	125	13
Topeka	125	13
Fargo	124	15
Ft. Wayne	124	15
San Diego	124	15
Wichita - Hutchinson	124	15
La Crosse - Eau Claire	123	19
Lima	123	19
Lincoln - Hastings - Kearney	121	21
San Francisco	120	22
Columbus, Ohio	119	23
Anchorage	118	24
Los Angeles	118	24
Omaha	118	24
Salinas - Monterey	118	24
Austin, Tex.	117	28
Miami	117	28
Rapid City	115	30
Boston	114	31
Davenport - Rock Island - Moline	114	31
Sioux Falls - Mitchell	114	31
Cedar Rapids - Waterloo	113	34
Detroit	113	34
Indianapolis	112	36
Washington, D.C.	112	36
Columbia - Jefferson City	110	38
Peoria	110	38
Rochester - Mason City - Austin	110	38
South Bend - Elkhart	110	38
Eugene	109	42
Reno	109	42
Springfield - Decatur - Champaign	109	42
Atlanta	106	45
Dayton	106	45
Gainesville	106	45
Hartford - New Haven	106	45
Milwaukee	106	45
Palm Springs	106	45
Green Bay	105	51
St. Louis	105	51
Toledo	105	51
Waco - Temple	105	51
Mankato	104	55
Rockford	104	55
Houston	103	57
Joplin - Pittsburg	103	57
Orlando - Daytona Beach	103	57
Wilmington	103	57
Alexandria, Minn.	102	61
Norfolk - Portsmouth - Newport News - Hampton	101	62
Sacramento - Stockton	101	62
Cincinnati	100	64
Denver	100	64
Erie	100	64
Oklahoma City	100	64
St. Joseph	100	64
Yakima	100	64
Des Moines	99	70
Flint - Saginaw - Bay City	99	70
New York	99	70
Traverse City - Cadillac	99	70
Tuscaloosa	99	70
Victoria	99	70
Cleveland	98	76
Philadelphia	98	76
Biloxi - Gulfport - Pascagoula	97	78
Sioux City	97	78
Providence - New Bedford	96	80
Amarillo	95	81
Duluth - Superior	95	81
El Paso	95	81
Springfield, Mo.	95	81
Twin Falls	95	81
Bend	94	86
Las Vegas	94	86
Minot - Bismarck - Dickinson	94	86
Albuquerque	93	89
Portland - Poland Spring	93	89
San Antonio	93	89
Greensboro - Winston-Salem - High Point	92	92
Lubbock	92	92
Rochester, N.Y.	92	92
San Angelo	92	92
Burlington - Plattsburgh	91	96
Cheyenne	91	96
Buffalo	90	98
Ft. Smith	90	98
Louisville	90	98
Medford	90	98
Odessa - Midland	90	98
Salisbury	90	98

Top 100 RGI Markets-1980

By metro area

Metro Area Name	RGI	Ranking
Las Vegas	542	1
Reno	285	2
Atlantic City	202	3
Provo - Orem	191	4
Williamsport	156	5
Jersey City	155	6
Salt Lake City - Ogden	154	7
Johnstown	149	8
Alexandria, La.	148	9
Pascagoula - Moss Point	141	10
Rochester, Minn.	141	10
Trenton	138	12
Florence, S.C.	137	13
Steubenville - Weirton	135	14
Pittsfield	132	15
Wausau	132	15
Colorado Springs	131	17
Tucson	131	17
Great Falls	130	19
Erie	126	20
Lorain - Elyria	126	20
Memphis	126	20
Baton Rouge	125	23
Pueblo	125	23
New York	124	25
Knoxville	123	26
Northeast Pennsylvania	123	26
Sheboygan	123	26
Greeley	122	29
Monroe	122	29
Casper	121	31
New Orleans	121	31
Providence - Warwick - Pawtucket	121	31
Little Rock - North Little Rock	120	34
Newark, N.J.	118	35
Philadelphia	118	35
Pittsburgh	118	35
Billings	117	38
Danville, Va.	117	38
Huntington - Ashland	117	38
Pine Bluff	117	38
Springfield, Ohio	116	42
Chattanooga	115	43
Kenosha	115	43
Hagerstown	114	45
Lancaster	114	45
Wilmington, Del.	114	45
Bridgeport - Stamford - Norwalk - Danbury	113	48
Lynchburg	113	48
Worcester - Fitchburg - Leominster	113	48
Elmira	112	51
Hartford - New Britain - Bristol	112	51
New London - Norwich	112	51
Phoenix	112	51
Springfield, Ill.	112	51
Bangor	111	56
Shreveport	111	56
Springfield - Chicopee - Holyoke	111	56
Miami	110	59
Midland	110	59
Mobile	110	59
Orlando	110	59
Sharon	110	59
Albany, Ga.	109	64
Harrisburg	109	64
Redding	109	64
Salisbury - Concord	109	64
York	109	64
Albuquerque	108	69
Charlotte - Gastonia	108	69
Jackson, Mich.	108	69
New Brunswick - Perth Amboy - Sayreville	108	69
Anderson, S.C.	107	73
Asheville	107	73
Denver - Boulder	107	73
Duluth - Superior	107	73
Las Cruces	107	73
Tulsa	107	73
Vineland - Millville - Bridgeton	107	73
Decatur	106	80
Jacksonville, Fla.	106	80
Petersburg - Colonial Heights - Hopewell	106	80
Portland, Me.	106	80
Racine	106	80
Visalia - Tulare - Porterville	106	80
Birmingham	105	86
Burlington, Vt.	105	86
Des Moines	105	86
New Haven - West Haven - Waterbury - Meriden	105	86
Sherman - Denison	105	86
Washington	105	86
Biloxi - Gulfport	104	92
Appleton - Oshkosh	103	93
Burlington, N.C.	103	93
Corpus Christi	103	93
Nashville-Davidson	103	93
Newark, Ohio	103	93
Parkersburg - Marietta	103	93
Sioux City	103	93
Charleston, W.Va.	102	100
Columbia, S.C.	102	100
Lake Charles	102	100
Minneapolis - St. Paul	102	100
Reading	102	100

By ADI

ADI Name	RGI	Ranking
Las Vegas	534	1
Reno	352	2
Alexandria, La.	166	3
Salt Lake City	155	4
Monroe - El Dorado	153	5
Selma	147	6
Bluefield - Beckley - Oak Hill	146	7
Great Falls	145	8
Idaho Falls - Pocatello	145	8
Florence, S.C.	144	10
Greenwood - Greenville	141	11
Twin Falls	139	12
Tucson	136	13
Casper - Riverton	133	14
Memphis	133	14
Miles City - Glendive	132	16
Wilkes-Barre - Scranton	132	16
Billing - Hardin	130	18
Roswell	130	18
Colorado Springs - Pueblo	129	20
Erie	129	20
Columbus - Tupelo	127	22
Albany, Ga.	126	23
Baton Rouge	126	23
Missoula - Butte	126	23
Presque Isle	125	26
Zanesville	125	26
Farmington	123	28
Little Rock	123	28
Charleston - Huntington	122	30
Clarksburg - Weston	122	30
Helena	122	30
Lafayette, La.	122	30
Quincy - Hannibal	122	30
Cheyenne	121	35
Harrisonburg	121	35
Pittsburgh	121	35
Jackson, Miss.	120	38
Ottumwa - Kirksville	120	38
Minot - Bismarck - Dickinson	119	40
Burlington - Plattsburgh	118	41
Knoxville	118	41
Rochester - Mason City - Austin	118	41
Johnstown - Altoona	117	44
Jonesboro	117	44
Philadelphia	117	44
Meridian	116	47
Ardmore - Ada	115	48
Chattanooga	115	48
New Orleans	115	48
New York	115	48
Wausau - Rhinelander	115	48
Montgomery	114	53
Bristol - Kingsport - Johnson City	113	54
Dothan	113	54
Elmira	113	54
Harrisburg - York - Lancaster - Lebanon	113	54
Lake Charles	112	58
Phoenix	112	58
Savannah	112	58
Terre Haute	112	58
Hartford - New Haven	111	62
Huntsville - Decatur - Florence	111	62
Nashville	111	62
Roanoke - Lynchburg	111	62
Shreveport - Texarkana	111	62
Springfield, Mass.	111	62
Birmingham	110	68
Evansville	110	68
Bangor	109	70
Columbia, S.C.	109	70
Duluth - Superior	109	70
Albuquerque	108	73
Augusta	108	73
Binghamton	108	73
Charlotte	108	73
Jackson, Tenn.	108	73
Jacksonville	108	73
Wheeling - Steubenville	108	73
Mobile - Pensacola	107	80
Raleigh - Durham	107	80
Denver	106	82
Watertown - Carthage	106	82
Greenville - Spartanburg - Asheville	105	84
Washington, D.C.	105	84
Macon	104	86
Parkersburg	104	86
Providence - New Bedford	104	86
Tyler	104	86
Abilene - Sweetwater	103	90
Columbus, Ga.	103	90
Des Moines	103	90
Paducah - Cape Girardeau - Harrisburg	103	90
Spokane	103	90
Tulsa	103	90
Greensboro - Winston-Salem - High Point	102	96
Minneapolis - St. Paul	102	96
Youngstown	102	96
Alexandria, Minn.	101	99
Omaha	101	99
Richmond	101	99
Sioux City	101	99
Wichita Falls - Lawton	101	99

Restaurant Business

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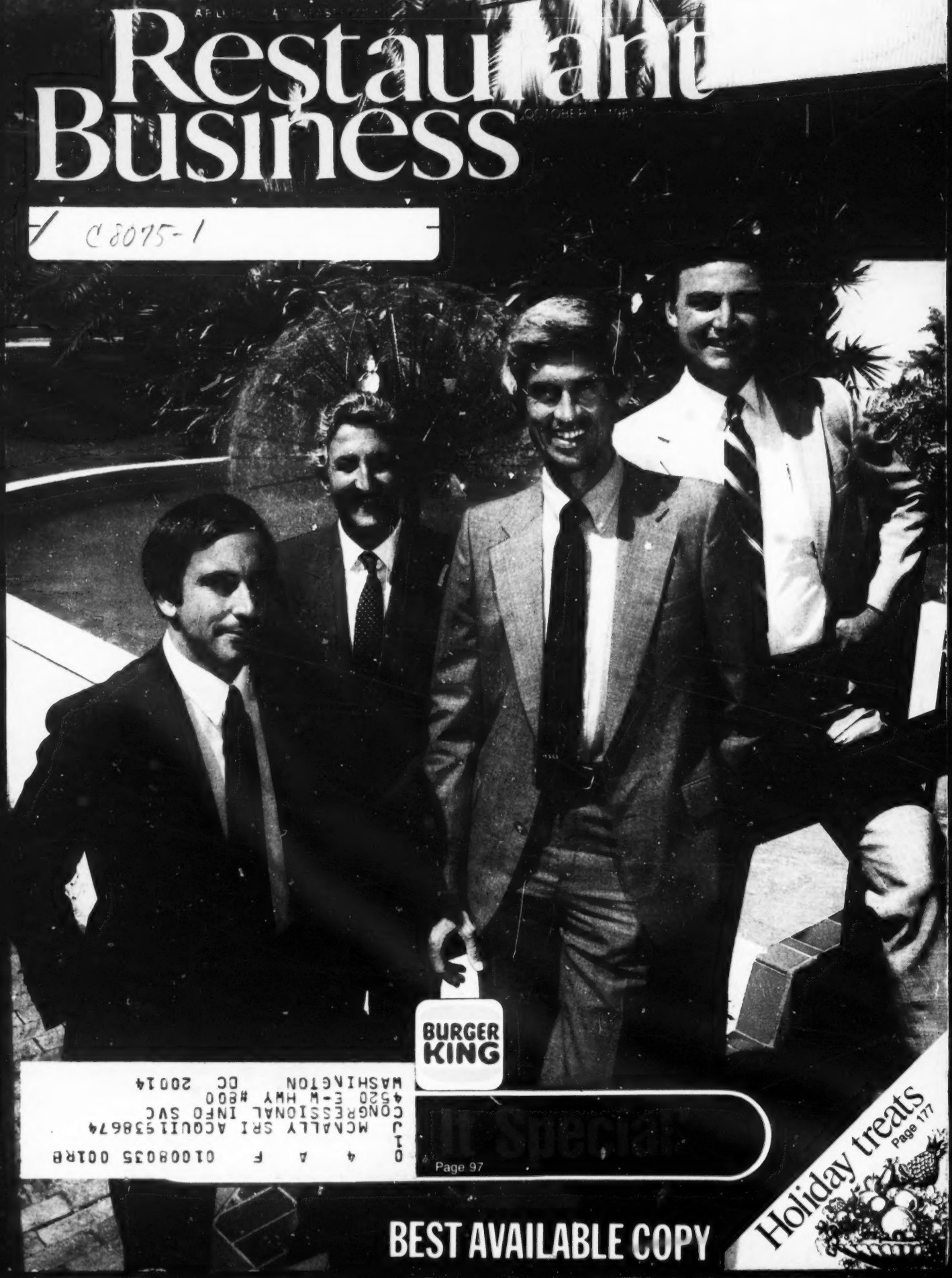

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Restaurant Business

OCTOBER 1, 1981

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Cover photo by David Dietrich/ Pelham and Friends

← Circle No. 9

Television Advertising

Shift towards local spending

Among all advertisers in the food category, restaurants ranked third in total national TV expenditures in 1980, spending $420 million.

Restaurants outspent by a wide margin all other retail businesses, including food stores and supermarkets, on local television advertising in 1980.

Fast food and restaurant advertisers spent $287.9 million on local TV last year, compared to $148.7 million spent by food stores and supermarkets, $140.9 million by banks and savings & loan associations, $131.2 million by department stores, and $111.4 million by furniture stores, according to the Television Bureau of Advertising (TvB) based on Broadcast Advertisers Reports (BAR) figures.

Among all advertisers in the food category, restaurants ranked third in total national TV—including local (or spot) and network—expenditures in 1980—spending $420.0 million. Grocery foods advertisers continue to be the top spenders in the food category, shelling out $1.4 billion on TV commercials, followed by candy and soft drink advertisers which as a group spent $493.3 million in 1980. In fourth place in the food category were beer and wine advertisers which as a group spent $398.4 million on TV last year.

Total TV expenditures by restaurants increased only slightly—up 3.4 percent—in 1980 over 1979 levels. While restaurants increased their local TV budgets by 9.3 percent in 1980 over 1979, they reduced their network budgets by 7.4 percent to $132 million in 1980 versus $142.7 million in 1979.

Among the top 15 TV advertisers within the restaurant industry, McDonald's continues its dollar dominance—outspending its closest competitor, Burger King, by a three

continued on page 60

Top 15 Television Advertisers 1980 vs. 1979

	1980			1979		
	Network	Local	Total	Network	Local	Total
1. McDonald's	$53,588,300	$66,612,900	$120,201,200	$62,456,300	$63,836,100	$126,292,400
2. Burger King	25,273,200	26,421,400	41,694,600	21,403,200	19,036,700	40,439,900
3. KFC	16,771,600	11,969,000	28,740,600	17,233,700	12,181,100	29,414,800
4. Wendy's	9,036,400	16,301,900	19,338,300	8,866,200	9,113,600	17,979,800
5. Pizza Hut	12,080,400	5,295,400	17,375,800	10,363,800	3,003,300	13,367,100
6. Red Lobster Inns	—	16,319,600	16,319,600	177,800	11,090,600	11,268,400
7. Long John Silver's	—	15,127,700	15,127,700	1,876,000	8,990,800	10,866,800
8. Arby's Drive-In	3,997,300	7,944,200	11,941,500	3,423,500	8,036,300	11,459,800
9. Denny's	4,432,100	4,376,000	8,808,100	—	3,432,300	3,432,300
10. Jack-In-The Box	—	8,326,300	8,326,300	—	6,447,300	6,447,300
11. Hardee's	491,800	7,685,800	8,177,600	—	5,828,000	5,828,000
12. Taco Bell	—	8,035,300	8,035,300	—	6,373,200	6,373,200
13. Ponderosa	2,002,700	4,448,600	6,451,300	3,677,300	—	3,677,300
14. Sizzler	—	6,416,000	6,416,000	—	6,671,700	6,671,700
15. Dairy Queen	—	6,127,800	6,127,800	—	4,570,600	4,570,000
Total	$127,673,800	$195,407,900	$323,081,700	$129,477,800	$165,209,300	$294,687,100

Note: In announcing the data for 1980, and restating the data for 1979, TvB stressed that national spot and local television investments have been adjusted by BAR to closely approximate the level of FCC local dollars in the 75 monitored BAR markets. They are not comparable to previously published data.

Source: Broadcast Advertisers Reports (BAR) data compiled by the Television Bureau of Advertising (TvB).

McDonald's continues its dollar dominance by outspending its closest competitor, Burger King.

Top 15 Local TV Advertisers 1980 vs. 1979

	1979	1980	% Chg.
1. McDonald's	$63,836,100	$66,612,900	+ 4
2. Burger King	19,036,700	16,421,400	−14
3. Red Lobster Inns	11,090,600	16,319,600	+47
4. Long John Silver's	8,990,800	15,127,700	+68
5. Kentucky Fried Chicken	12,181,100	11,969,000	− 2
6. Wendy's	9,113,600	10,301,900	+13
7. Jack-in-the-Box	6,477,300	8,326,300	+29
8. Taco Bell	6,373,200	8,035,300	+26
9. Arby's Drive-In	8,036,300	7,944,200	− 1
10. Hardee's	5,828,000	7,685,800	+32
11. Sizzler Steak House	6,671,700	6,416,000	− 4
12. Dairy Queen	4,570,600	6,127,800	+34
13. Pizza Hut	3,003,300	5,295,400	+76
14. Burger Chef	4,606,400	4,968,700	+ 8
15. Arthur Treacher's	6,425,200	4,467,400	−30
TOTAL TOP 15	$176,240,900	$196,019,400	+11

Note: These local television figures have been adjusted by BAR to closely approximate the level of FCC local dollars in the 75 monitored BAR markets. They are not comparable to previously published data.

Source: Broadcast Advertisers Reports (BAR) data compiled by the Television Burea of Advertising (TvB).

to one margin. In 1980 McDonald's spent $120.2 million on TV advertising, while Burger King spent $41.7 million, according to TvB.

As are a number of other chains, McDonald's is shifting its emphasis from network to local TV. Its network spending dropped 14.2 percent to $53.6 million in 1980, while local TV spending increased 4.3 percent to $66.6 million last year.

Both Red Lobster and Long John Silver's dropped network advertising altogether in 1980, while dramatically increasing their local TV expenditures—Red Lobster by 47 percent and Long John Silver's by 68 percent.

Denny's—making its first appearance on the chart of the top 15 TV restaurant advertisers—posted the biggest increase in TV expenditures last year. Its TV budget swelled 164 percent to $8.8 million (versus $3.3 million in 1979) and benefited from its $4.4 million debut on network plus a 31 percent increase in local TV advertising. □

Gas operated

MTG-A
The high production griddle for frozen meat

Wolf's Master Thermo Griddle beats the chill factor

Wolf's heavy duty, gas operated Master Thermo Griddle is designed to cook frozen food, especially for mass production in Fast Food operations. The Master Thermo Griddle gives you maximum production in minimum time. This unit is available in widths from 36" to 72". Contact your Wolf dealer today for complete details about how to beat the chill factor!

- 1" thick highly polished steel griddle plate.
- Uniform distribution of heat.
- Supersensitive thermostat every 12".
- Stainless steel front and ends with stainless steel back splash and sides.
- Large capacity grease drawer on one or both sides.

GAS—The Saving Way to Cook
Wolf Range Company
19600 South Alameda Street, Compton, California 90224
Telephone (213) 637-3737

Circle No. 38 on Reader Service Card

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